User's Manual

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Welcome!

The *User's Manual* is your complete reference guide for the Studio Organizer. Keep a printout by your computer. It's designed to be used after the *School Setup* tutorial has been completed. It contains all of the information in the *Guided Tour* and much more.

The Studio Organizer is the Fifth Generation
The Studio Organizer is the fifth major revision of the Martial Arts Organizer line of software products.
Since 1996 Martial Arts Organizer has been sold to over 1400 schools around the globe.

The Studio Organizer is a tremendous step forward, and significant changes have been made to accommodate dance, gymnastics and yoga studios. Welcome! Suggestions are always encouraged, especially if the Studio Organizer is missing an important feature commonly used in your industry. Feel free to email your suggestions and comments.

As you review the software and read the tutorials, you'll see our roots showing. We'll use martial arts terms like ranks, promotions and training days. Feel free to disregard any terminology or features that don't apply to your industry.

Since all of the documentation was originally written for Martial Arts Organizer, we'll use the word *student*, but you can select Customer, Client or Member on the General folder tab of the Preferences screen. You'll also the word *rank*, but you can select level if that's more appropriate. The selections you make will appear in buttons, printouts, reports, ID cards and more but you may see the words *students* or *ranks* in some dialog boxes or report descriptions.

Install Only One Copy of the Studio Organizer

This is Very Important. Please Read this Page!

It's very important to be sure you have only one functional copy of the Studio Organizer installed on your computer. Since the 30 day trial and the full working version are the exact same files, there is nothing more to download or install when you purchase. Simply enter your Registration Code to disable the 30 day trial limitations.

Please be sure you have not installed more than one copy of the Studio Organizer on your computer. Also, please do not copy the *Studio Organizer* folder to another location on your hard drive as a backup. If you do either of these you will have more than one functional copy of the Studio Organizer installed on your computer. This can create tremendous problems, especially if you are unaware you are using two different copies of the software.

Sometimes users will download and install several copies of the free 30 day trial. They'll purchase, register, and begin to enter their data into one copy, then a few weeks or months later open a duplicate copy of the software that only contains the sample data. They'll see the software has not been registered and think all their data has been lost when it fact it's in a different set of files.

Another problem might be a user enters ten new student records into one copy of the Studio Organizer. The next day they inadvertently open a *different* copy of the Studio Organizer. Those ten records will be not be there. Users that have duplicate copies of the Studio Organizer will email tech support and say their data has disappeared. Unfortunately there is no way to merge or synchronize records from two different sets of files to correct this error.

As you can see, it's very important to be sure there is only **one** copy of the Studio Organizer on your computer. Search your computers hard drive for "Studio Organizer" and files with a ".tso" extension. If you find more than one Studio Organizer folder open the *Data* folder and examine the modification dates of the .tso files to determine which files have been modified most recently. Delete the Studio Organizer folder that contains the older .tso files. Also be sure to delete any aliases or shortcuts to the deleted files. Sorry, there is no way to merge or sync data from the old files.

Finally, if you're receiving an error message stating your free 30 day trial has expired, but you know you've already registered your software, this also means you have two copies of the Studio Organizer installed on your computer. One has been registered, and the second has been used for entering your student information. In this case, open the version which has all of your current information and click the Purchase button and follow the steps to register the software. Then find and delete the other, unused the Studio Organizer folder.

Limitations & Warnings Please Read!

Date Changing Prohibited
Please do not change the date on your computer to a previous date. Doing so will cause the Studio Organizer files to detect an error and lock. They can only be reset by submitting the files to technical support. Instructions for submitting your file will be displayed on your screen.

Attendance Check In & Networking
It's not possible to record attendance while performing other computer tasks. The Studio Organizer must always be in attendance check in mode and be the foreground application in order to record attendance. As a workaround to this limitation, a wizard has been designed that let's you dedicate a computer to attendance recording. This is a free feature.
Or the Studio Organizer can be networked, with one computer dedicated to real time attendance recording. The downside is one copy FileMaker Pro software must be purchased for each computer you wish to network. The software costs about $300 per computer. The free solution, and networking are explained in detail in the *Working With Data* tutorial.

Duplicate Installations
It's possible to install more than one copy of the Studio Organizer on your computer then have two sets of data files which cannot be merged. This is a computer housekeeping issue which is easily avoided. Please read *Only One Copy Of The Studio Organizer*.

Updates & Student Photos
From time to time the Studio Organizer is updated to add new features, improve the documentation, and fix bugs. To correctly install updates only the Updating the Studio Organizer Wizard should be used. Registered users will be emailed when updates are available. A complete description of the updating process is in the built in Help.
Also, student photos will not transfer to new versions if they are not stored in the correct folder. All photo images *must* be stored in the *Student Photos* folder.

Close Buttons & Window Resizing
The standard close buttons at the top of windows are disabled. Instead, the Studio Organizer has Close buttons at the bottom of most screens, or a small red Close dot in the top right corner of a window. Most windows are resizable, however window resizing is inconsistent on Windows computers. To work around this issue select a Resizing Windows preference on the General folder tab of the Preferences screen.

Quickbooks & Accounting Software
The Studio Organizer does not integrate with Quicken, Quickbooks or any other accounting software. I have worked with many studio owners who have used other software products that offer 'Quickbooks integration.' The feedback is always the same -- it's more of a marketing gimmick than a workable solution. It's expensive, unreliable and time consuming. A far simpler solution exists. Instead of attempting to duplicate invoices and payments, you can use the Studio Organizer to create invoices for all of your sales and tuition. When it's time to place that information into your accounting software, run the *Invoices*, *Invoice Items* or *Sales Tax* reports in the Studio Organizer then enter the totals into your accounting software as a single journal entry. You can now use your full featured accounting software for tax reporting purposes, etc. This is fast, easy, and hassle free.

Learning to Use the Studio Organizer

As a teacher, you know the value of proper instruction. Every day you share your knowledge and skills and pass them on to a new generation. When it comes to computers, the younger generation has a distinct advantage; they have been *taught* how to use computers. They also have *hands on experience* performing every day tasks. You know the value of expert instruction and experience. You make a living by providing both.

For some reason, when it comes to computers we disregard instruction and experience. Maybe it's because computers are sold like television sets. Despite what people in computer sales will lead you to believe, a computer is not a television set. Learning to use a computer has a lot in common with learning to drive. How did you learn to drive? Someone taught you. The rules of the road were spelled out for you. At first you drove around in empty lots. After a while they let you drive on public streets with an instructor beside you. Finally, before you could drive by yourself, you had to take a test to prove you had the knowledge and experience to safely operate a motor vehicle.

What if you didn't know the rules of the road and just started driving around town? I'll bet you could do it, but you sure would be dangerous at intersections. How far would you get if all you could do was guess?

Using a computer to manage a business is very similar. You're headed for trouble fast if you have little to no instruction and no experience. If you don't know the rules of the road for computers, you won't know where files are saved, you'll double click when you should single click, and downloading software will be confusing. Even receiving technical support will be difficult. I know, I work with end users every day, and my goal is to empower you.

It's essential to understand you have to receive instruction in order to use a computer. You have be taught the rules of the road. Then you'll need some hands on time with someone beside you to apply the brakes if you take a wrong turn. How do you think the younger generation knows so much about computers? They're taught in school. When they have a question, they raise their hand and a teacher comes to their side, looks at their computer screen, and shows them how to perform the correct steps. That's instruction and experience.

There's more to owning and using a computer than receiving instruction. Computers need regular maintenance. That means operating system updates, virus protection, security updates, backup software and more. Who is going to help you do all of this? Your computer mentor. Finding one is as important as finding a good auto mechanic. Try to go it alone, and you'll end up stranded on the side of the road. Computers will frustrate and intimate you. If that describes your experience using a computer, you need a mentor. Don't go it alone. Get someone to be your guide. Start by asking your students.

The first step is to read the free eBook *This is Your Brain*. As a teacher, you'll want to read this article. You'll learn how we learn and how fear blocks learning. It also tells you how to find a computer mentor. *This is Your Brain* is already on your computer. It's inside the *Free eBooks* folder inside the *Studio Organizer* folder on your hard drive. While you're there, please also print and read *Lessons from the Road* which helps you understand why students sign up, why they quit and what you're really selling. It has an entire chapter devoted to computers.

Before you attempt to use the Studio Organizer (or any computer software) to manage your business, here's a brief check list of essential computer skills:

__ I can define: *upload*, *download* and *install*. I can download software to my computer and know the location of downloaded files.
__ I'm comfortable running installation software. I know where software is being installed on my computer.
__ I understand the filing system of my computer. I know how to properly use Open and Save dialog boxes.
__ I can reorganize my files & folders and search my hard drive.
__ I know how to copy files & folders to a USB flash drive.
__ I known how to create shortcuts and aliases.
__ I know how to compress a file.
__ I know how to attach a file to an email.
__ I backup all of my unique files on a daily basis. I know how to restore a backup.
__ I install operating system and software updates as they become available. I keep my software current.
__ I perform regular maintenance to assure my computer is healthy and virus free.
__ If networking, I know how to open a shared network folder or volume.
__ I have a computer expert that can come to my computer and provide hands on training and troubleshooting.

The last one is the most important. Every computer user needs to have an expert to help them. (I have two.) Once you have the above basic skills under your belt it's time to begin to use the Studio Organizer. Read each of the tutorials. Don't try to read them all in one sitting. Instead, pick a chapter, sit down at the computer and teach yourself something new. Invest thirty minutes at a time and in a few weeks you'll understand how the Studio Organizer was *designed* to be used.

The 10 Minute Rule: Frustration is Bad

If you find yourself stuck trying to do something, please stop after 10 minutes. Why? The longer you spend going nowhere, the more frustrated you'll become. Please don't continue to repeat the same steps if something isn't working. Instead click the Support button and email me your questions. I've made email Technical Support free and unlimited so you can always get an answer without having to worry about busy signals, missed phone calls, hours of operation, or expensive support contracts.

Sincerely,
Jeff Pagano

Updating the Studio Organizer is Different...

When a new version of the Studio Organizer is released you can easily transfer your data into that version, but the updating process is different than other software programs.

That's because the Studio Organizer was built using FileMaker Pro software, and oddly enough, FileMaker Inc. has never devised a way for end users such as yourself to easily update when a version is released.

Most programming languages keep user data in one set of files, and data entry screens and reports in another set of files. So when an update is released, all the user has to do is download the new data entry screens and reports, and a convenient installer program puts them in the correct location. The user opens the software and all of their data appears exactly as it was, but is displayed in the new data entry screens and reports. Simple!

FileMaker Pro, for some strange reason, keeps user data, data entry screens and reports all in one file. This means the only way to get your data into a newer version of the Studio Organizer is to install the new version on your computer, then *import* your data from the old version to the new version.

This creates a number of potential problems. First, users who have not read these paragraphs will download a new version, open the new update, and think all of their data has been lost!

Second, users must install the Studio Organizer AGAIN, and that means two or more copies of the Studio Organizer will be installed on the computer's hard drive. This creates a potentially confusing housekeeping chore. Users must delete unneeded files, folders, shortcuts and aliases. If a user does not follow the updating instructions, he'll end up with multiple copies of the Studio Organizer installed on his computer.

The third potential problem is importing errors can occur. To overcome these limitations, the Studio Organizer includes an Updating Wizard and data verification that greatly reduces importing errors.

Knowing these limitation exist, why not use a different programming language? Because FileMaker Pro is very, very stable. It runs remarkably well and has for over two decades. There isn't anything else out there that's as powerful, stable and affordable. So the updating dilemma is unfortunate, and not user friendly, but it's not a big enough fly in the soup to throw the whole bowl away.

Updating the Studio Organizer

You can update from any version of the Studio Organizer to the most current version. It is not necessary to install previous updates. Your Registration Code will transfer along with your data so it's not necessary to reenter your Registration Code. Be sure to install each Studio Organizer update when it becomes available. Updates contain new features, interface & documentation improvements and bug fixes. Before updating, print and read the Version History on the web site for a complete list of what's been added and how to use the new features.

Master Password Only
Even if you have created other passwords, the first time you open a new version of the Studio Organizer, you must open it with the Master password. This is because the passwords you have created are not included in the version you download from the web site. Any passwords you have created are transferred during the updating process and will be available after you have successfully updated.

Updating Instructions
To update, open the Studio Organizer with the Master account name and password, then go to the Wizards menu at the top of your computer screen and select *Updating the Studio Organizer*. All the instructions are right on the screen, but here's a brief overview of what you'll do:

Step 1 Open the version of the Studio Organizer you are currently using with the Master account name and password. Go to the Wizards menu and select *Updating the Studio Organizer*. Click the Begin Wizard button and read the instructions on the screen. When you click the Begin Updating button this backups all your data and temporarily copies the backup files to your computers Desktop.
It also locks the current version so if you were to open it accidentally you'll see an error message stating this is an old version. (Click Unlock to open the file.)

Step 2 Next you'll be taken to the Updating web page. Follow the instructions on the screen to download and install the new version of the Studio Organizer.

Step 3 Open the new version of the Studio Organizer with the Master password provided with your Registration Code. Click Register Later, then go to the Wizards menu, select *Updating the Studio Organizer* and click Finish Wizard, read the instructions, then click Finish Updating. This copies the backup files from your computers Desktop into the new the Studio Organizer *Data* folder, deletes the backup files from the Desktop, then imports your data into the new version.
Be sure to follow the Cleaning Up instructions carefully to prevent accidentally opening the old version.

Technical Support

Email Technical Support is FREE!
The Studio Organizer is designed to be easy to use, but it's still computer software and understanding how to make it work for you means asking questions and getting answers. That's why email technical support is offered free of charge.

In order to receive free email technical support just click the Support button on the screen where your question occurs. Or select Technical Support from the Wizards or Help menu.

This will start the Smart Support Wizard. It's a powerful tool that will help you gather all of the essential information:
1) what you are attempting to do 2) the steps you are performing 3) the exact text of the error message.

Your Data is Not Included
Using the Smart Support Wizard is essential, however this does not *show* technical support the data on your computer screen. To do this you can take a snapshot of the screen and include it when you use the Smart Support Wizard. It's also possible to send snapshots by following the *Sending A Screen Snapshot* instructions in the built in Help. In some cases, technical support may request your data files. This is often the only way to resolve certain problems.

Emailing Your Question
The Smart Support Wizard will work with any email service. Be sure to select your default email application as described in the built in Help, the *School Setup* tutorial and the *User's Manual*. Your email application must be open and running before sending a message.

You can even use the Smart Support Wizard if you do not have an internet connection at your school. Read *No Internet Connection At School* in the built in Help.

Only the Studio Organizer is Supported
Please note technical support is only provided for the Studio Organizer software. Operating systems, hardware, and other software programs are outside of our area of expertise.

Telephone Support
In order to keep the Studio Organizer affordable, we do not have a call center.
Sorry, telephone support is not offered in any fashion.

Asking the Right Question

In order to help you receive the quality tech support as quickly as possible here, are a few pointers that will help you get answers fast.

Always use the Smart Support Wizard
In order to receive fast, free email technical support please always click the Support button on the screen where your question occurs. None of your data is included in the message created by clicking the Smart Support Wizard.

Please Be Specific
When you use the Smart Support Wizard it will help you gather the necessary information:

1) what you are attempting to do
2) the specific steps you are performing
3) the undesired result or text of the error message

Please provide detailed information. The more specific, the better. The idea is to provide enough information so tech support can *duplicate* your steps and see the same problem you are experiencing. Since none of your data is included when you send an email, tech support cannot see any of your records or student information useless you send a screen snapshot or email your data files.

If you're receiving an error message, please state the *exact* text of the message or include a screen snapshot.

Before you click the Send button reread your email and pretend you're someone who cannot see your computer screen or your data. Ask yourself: "Have I given this person a clear picture of the problem I'm experiencing?" "What questions will this person ask based on what I've just told him?"
"Are there any other details I should mention just to be thorough?"

If you have questions on several different screens, please click the Support button on each screen and send an individual email for each question. Sending multiple Support emails is not a problem at all. There are some issues that can only be solved if you click the Support button, so please use the Smart Support Wizard each time you ask a question.

Setting the Default Email Application

The Studio Organizer does not send or receive email messages. Instead, the software will transfer an email message to your email software, then the email software will send the message. An email account and internet connection are required. If you are using an email application such as Windows Live, Outlook Express, Entourage, Eudora or Mail, the next step is to designate a default email application.

For best results, be sure your email application is open and running before performing these steps or using the emailing features in the Studio Organizer.

Windows 7 & Vista

You can use any MAPI compliant email client, such as Windows Live Mail, Microsoft Entourage or Eudora. You'll select the default email application by going to the Start Menu, selecting Program Defaults, then single click the program you wish to use as the default email program from the list on the left and click **Set this program as default** on the right.

Now you can click **Choose defaults for this program** to customize the defaults for your email application. Click OK to save your changes. Restart your computer.

Windows XP

You can use any MAPI compliant email client, such as Outlook Express, Microsoft Exchange or Eudora. It may be necessary to open your email client before sending an email.

You'll select the default email application by going to the Start Menu, selecting Set Program Access and Defaults, then if it's not already selected, single click the Set Program Access and Defaults button on the bottom left.

Now you can click the **Custom** option and choose the email application you like to use and designate it as your default. Click OK to save your changes. Restart your computer.

Macintosh OS X

Macs with OS X have an application called Mail already installed. You can also use Entourage, Thunderbird or Eudora.

To change the default email application open Mail, then go to the Mail menu and select Preferences. Click the General folder tab and choose your email application from the Default Email Reader drop down menu. If your email application is not in this list, click the Select menu option and an open dialog box will appear. Now find the email application and select it.

Web Based Email & No Internet Connection

Using the Clipboard to Send Emails
If you're using America Online or a web based email service such as gmail, Yahoo, Hotmail you can use the Studio Organizer to send email and technical support messages.

Select *My Computers Clipboard is used for creating email messages* on the General folder tab of the Preferences screen, or in the Smart Support Support Wizard.

Now each time you click the Send button the email message or tech support information is copied to your computers clipboard. Open your web browser and go to your email web page, create a new email message, click into the message area and paste. Address the message to tech@StudioOrganizer.com.

Only one email message can be sent at a time. Sending multiple emails requires a dedicated email application such as Outlook, Entourage, or OS X Mail.

No Internet Connection at School
Even if you don't have an internet connection at school, you can still use the Smart Support Wizard. Here's what you'll do:

Go to the General folder tab of the Preferences screen. At the very top, select *My Computer's Clipboard is used for sending email.*

When you click Send from the Smart Support Wizard, the necessary information will be placed in your computer's clipboard. Next, open a word processor and paste. Save the file and transfer it to a USB flash drive or other media.

Insert the flash drive into the computer that has an internet connection and open the file, then select and copy all of the text.

Now open your email software, create a new email message and paste the text into the message area of the email.

Address the email to tech@StudioOrganizer.com.

Screen Snapshots & Emailing your Files

The Smart Support Wizard allows you to easily add a screen snapshot to your message. However, networked computers cannot use this feature because the required file is inaccessible on the server. If you would like to send a screen snapshot manually, first complete the Smart Support Wizard and send your question. Next follow these steps to create a snapshot and email it it to tech@StudioOrganizer.com.

Macintosh
The keyboard shortcut **Command + Shift + 3** creates files on your Desktop or hard drive called 'Picture 1,' 'Picture 2' etc. You can attach this file to an email message. Some email programs allow you paste an image directly into the message area. Send your image to tech@StudioOrganizer.com.

Windows
Hit the PRINT SCREEN key on your keyboard. This places an image of the current screen on your computers clipboard. Most email software programs allow you to paste directly into an email message. Paste your screen snapshot into the message area of an email. Send your image to tech@StudioOrganizer.com.

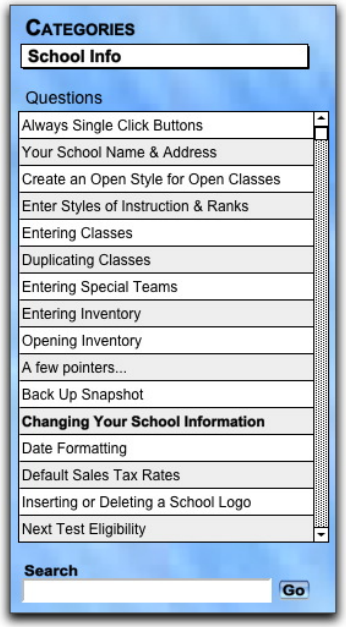
If you cannot paste into an email message open Microsoft Word or a graphics program and paste. If asked for a file format, select `jpg` or `gif`. Once you've created a screen snapshot file, email your image to tech@StudioOrganizer.com.

Emailing Your Data Files
In certain situations technical support require your data files. In order to correct an error or troubleshoot a problem, your data files must be emailed to technical support.

Which Data Files do I Send?
Technical support will request the necessary files by name.

Before sending any files, please quit the Studio Organizer then compress and attach only the requested files. Also, be sure to always use the Smart Support Wizard when requesting support.

the Built In Help & Networking



Much of the information you're about to read in these tutorials is directly from the Help system build into the Studio Organizer.

The Help system can be accessed from just about any screen by simply clicking the Help button in the top left corner.

Use the Category drop down menu to select from a variety of Help topics. Single click directly on an item from the list to display the Help text.

To search the Help files, type what you're looking for into the Search field, then click the Go button. Click the Print button to print a Help topic.

Networking the Studio Organizer

Networking is a great way to share the Studio Organizer with everyone in your office, but it requires additional hardware and software. Networking is an optional feature which allows you to share the Studio Organizer in real time between two to nine computers on a network. (If you wish to network more than nine computers, please contact technical support for details.) You'll need a professional to set up the wiring and hubs.

The Studio Organizer.com does not charge any additional fees for a user to network, however, FileMaker Pro software must be purchased and installed on each computer. You can purchase the FileMaker Pro 11 software from any source you wish, such as www.softwaremedia.com. The cost is roughly $300 per computer. (Do not purchase the Advanced or Server versions.)

Since it's not possible to record attendance while using other features of the Studio Organizer on a single computer, networking is a great way to dedicate a computer to attendance check in, but it's not required. To spare you the expense of networking, the Studio Organizer offers you the ability to dedicate a computer to attendance recording without networking. Please read *Attendance Computer: No Network Required* in the built in Help or the *Working With Data* tutorial.

Purchasing and installing the FileMaker Pro software allows users to network as well as create PDF files, export to Excel, and more.

Additional Help & Information Resources

Version History
Would you like to see what's new in the Studio Organizer? Or what's been changed, added or fixed in each new release?

Just click the Version Check button on the Main Menu, then click the Version History link.

Or go to www.StudioOrganizer.com and visit the Update page, then click the Version History link.

An internet connection is required.

Your Computer Guru
If you're not 100% comfortable working with computers, please read *This is Your Brain* in the *Free eBooks* folder inside the *Studio Organizer* folder. If you're unfamiliar with the tasks technical support is asking you to perform, you will need computer professional to visit your computer.

When trouble rears it's ugly head the fastest and most efficient solution is to let a professional tackle the problem.

There's just no substitute for having a computer expert right there in the room with you, teaching you new skills, solving problems, and answering your questions. Computers are complex contraptions and finding your personal computer guru is as important as having a good mechanic or doctor. Don't go it alone, you'll be much more productive if you have an expert computer helper.

Don't want to hire a professional? Ask your students or parents. There's sure to a knowledgeable computer user who will be happy to assist you. Read *This is Your Brain* for more about finding a computer guru.

Getting Started

Launching the Studio Organizer

Open the *Studio Organizer* folder.

Double click the Studio Organizer icon.

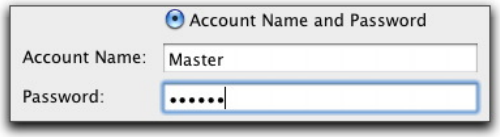
Windows users: If double clicking the shortcut produces an error message, delete it, and open the *Studio Organizer* folder, open the *Data* folder, and double click the Studio Organizer application.

Do not rename or remove any files in the Studio Organizer folders.

Entering a User Name
The first time you open the Studio Organizer, you will be prompted to enter a User Name. Enter your full name. For security purposes, do not enter a password into the *Enter User Name* dialog box.

the Default Account Name
You can change the default Account Name by clicking the "Set Default Account Name" link on the Preferences screen. It's in the lower right corner.

Enter the Master Password
Next, the Log In screen will appear. The first time you open the Studio Organizer as a registered user, you must enter the word `Master` into the Account Name field.



Hit the TAB key then type the password provided in your Registration Code email.

Please do not give out the Master password to staff members. You will be able to create unique passwords for yourself and each staff member when you create their staff record.

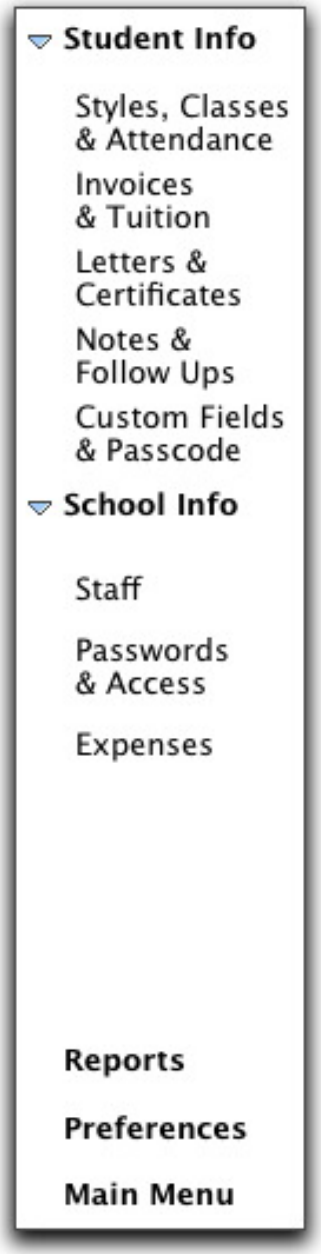
the Main Menu

Buttons on the Main Menu

After the Studio Organizer opens, you'll be viewing the Main Menu. All buttons in the Studio Organizer require just a single click. Click the Student Info or Member Info button to be taken to the primary data entry screen. From here, you can access all of the other screens.

Here's a quick run down of all the buttons on the Main Menu: The Check In button begins recording attendance. The Quick Invoice button let's you create an invoice for an existing student. The Find Student (or Member) button presents a pick list which lets you quickly go to a students record. The Follow Ups button will display today's follow ups. The Find Calendar button will display a calendar. The School Info, Tutorials, Preferences, Staff, Reports and Inventory buttons opens their respective screens. The Version Check button launches your web browser and checks to see if you're using the most current version of the Studio Organizer. The Purchase button allows you to purchase or register the software. The Go To button let's you jump to a screen.

the Navigation Column



From the Main Menu, single click on the Student Info or Member Info button to view the Student Info screen. This button may also be called Member Info, Customer Info, or Client Info, depending your the Customer Label preference you've selected on the General folder tab of the Preferences screen. Just to make things easier, we'll use the term *students* through the documentation.

On the left side of the Student Info screen is a column of text. This column of text allows you to navigate to each of the data entry screens.

Single click on the text in the left column to view a screen. For example, click on School Info to view that screen.

The screens under Student Info are used for entering information about students.

The screens under School Info are used to customize the Studio Organizer, create staff records and passwords as well as record expenses.

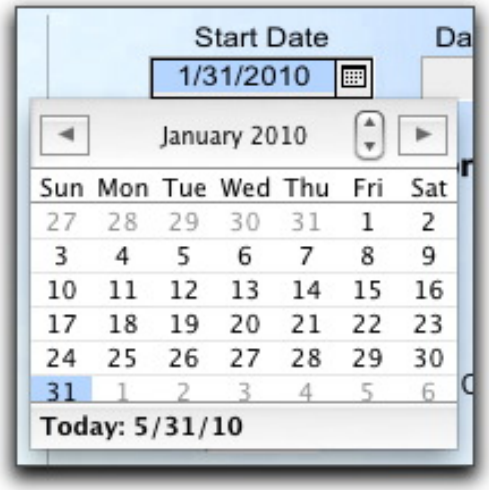
Single click the small blue arrow to the left of the Student Info or School Info headings to hide or show the list of screens. Click the small blue arrow once to display the subheadings. Click it a second time to hide the subheadings.

The Reports, Preferences and Main Menu buttons are fixed at the bottom of the screen.

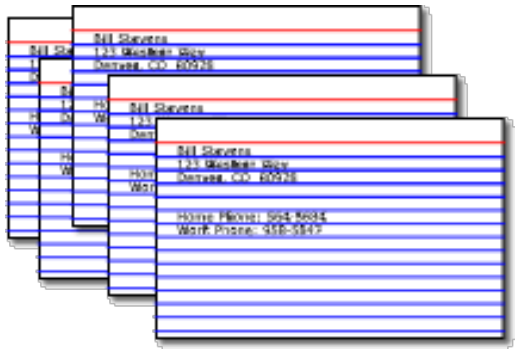
Before You Begin

Always Single Click Buttons
When using the Studio Organizer all buttons require just a single click. Clicking twice may result in duplicating a command.

Date Fields: Enter the Year as 4 Digits
Most date fields have a drop down calendar. It won't be often that you'll type a date by hand, but if you do be sure to enter the year as four digits. For example, enter `2/4/2010` not `2/4/10`. If you enter the year as `10` older computers may interpret this as 1910.



Database Terminology



Let’s use the analogy of 3" by 5" cards to explain a few database terms.

A *database* is a computer file, but imagine instead its a stack of 3" by 5" cards.

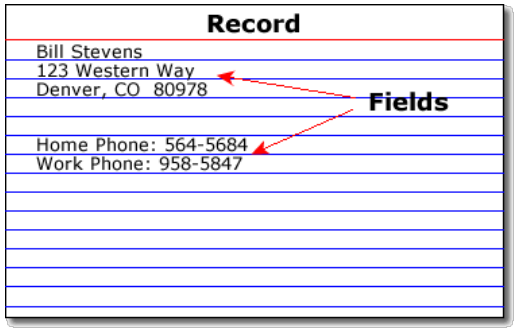
On each card you can write specific information such as name, address, phone, etc.

In database terminology, each 3" by 5" card is a *record* and each type of information you fill in is a *field*. So name is a field, there are several address fields, and there are also phone number fields.

Data is anything you type into a field.

Once you enter data into a field, that field can be displayed on a number of different *screens*. For example, if you type a student's first name on the Student Info screen, that name will also appear on all of the other screens, as well as in reports, ID cards... everywhere.

In a paper based system you have a file folder for each student that contains multiple pieces of paper. For example, in a student's folder you could have a card with his address info, a tuition payment schedule, a contract, and several pages recording his purchases.



A paper based system requires you to repeatedly rewrite quite a bit of information such as the students name and address. Also, there's no easy way to total his purchases or create a report of all purchases.

When you begin to use the Studio Organizer you'll find you only have to enter information once, and then it will appear on many other screens. All the information can also be totaled and reported in a wide variety of ways.

Browsing Records with the Arrow Buttons

When you are viewing records in the Studio Organizer this is referred to as *browsing*. Use the arrow buttons in the top left corner of the screen to browse through your student records.

The double left button will take you to the first record and the double right button will take you to the last record. The left button will take you to the previous record and the right button will take you to the next record. All buttons require just a single click. Double click, and you may end up doing something twice.

The Scripts menu at the top of the computer screen also contains keyboard shortcuts for faster browsing.

Viewing Your Data

There are two ways to view your data: *View as Form* and *View as List*.

On the Student Info screen, single click the List View button at the top of the screen to view your student records in rows. To return to the form view, click on a student photo or the View button on the far right. You can also click the Form View button at the top of the screen.

You only have to enter data once in a form and it's automatically entered into list views. Most of your data entry screens use View as Form which displays only one record on your screen. Most reports use View as List. When viewing a list the black bar on the left indicates which record is active. Click into a record to make it the active record.

Drop Down Menus

When you tab into some fields, a drop down menu opens displaying all the previous entries.

To select an entry, type the first few letters of the desired selection, or use the arrow keys to select the item, then hit the ENTER key on your keyboard.

To close the list and enter a value not in the list, hit the BACKSPACE, CLEAR or DELETE key or click into the field a second time.

If a field is self-populating, new entries to you make will be added to the list. If an item is incorrect in your drop down list, search your records for the incorrect record, and correct it.

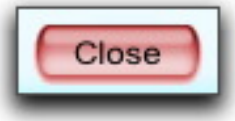
A few pointers...

Set your screen resolution to 1024 x 768 or larger for best viewing.

Keys to press on your keyboard will appear in ALL CAPS in this manual.

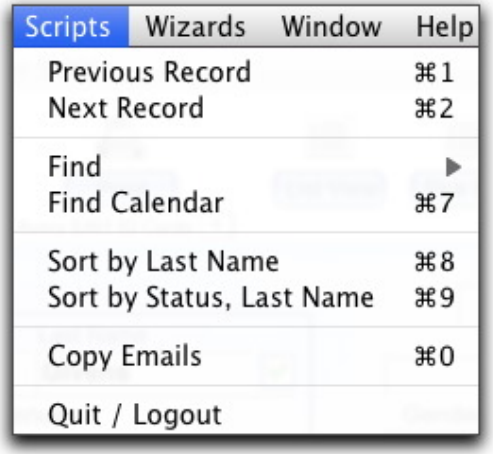
Hit the TAB key to move to the next field. Hold the SHIFT key, then hit TAB to move to the previous field.

The Close buttons at the top of windows are disabled. Use the Close button or the small red Close dot in the top right corner of the screen to close a window.



Close button

Most windows are resizable. Click and drag the bottom right corner of the window to change it's size. Also see the Resizing Windows preference on the General folder tab of the Preferences screen.



Many menu commands have keyboard shortcuts. They are displayed to the right of the command when the menu is displayed.

If a field has a drop down menu, it will eventually fill up with the values you've entered. So if a drop down menu is blank, it simply means nothing has been added to this field -- yet.

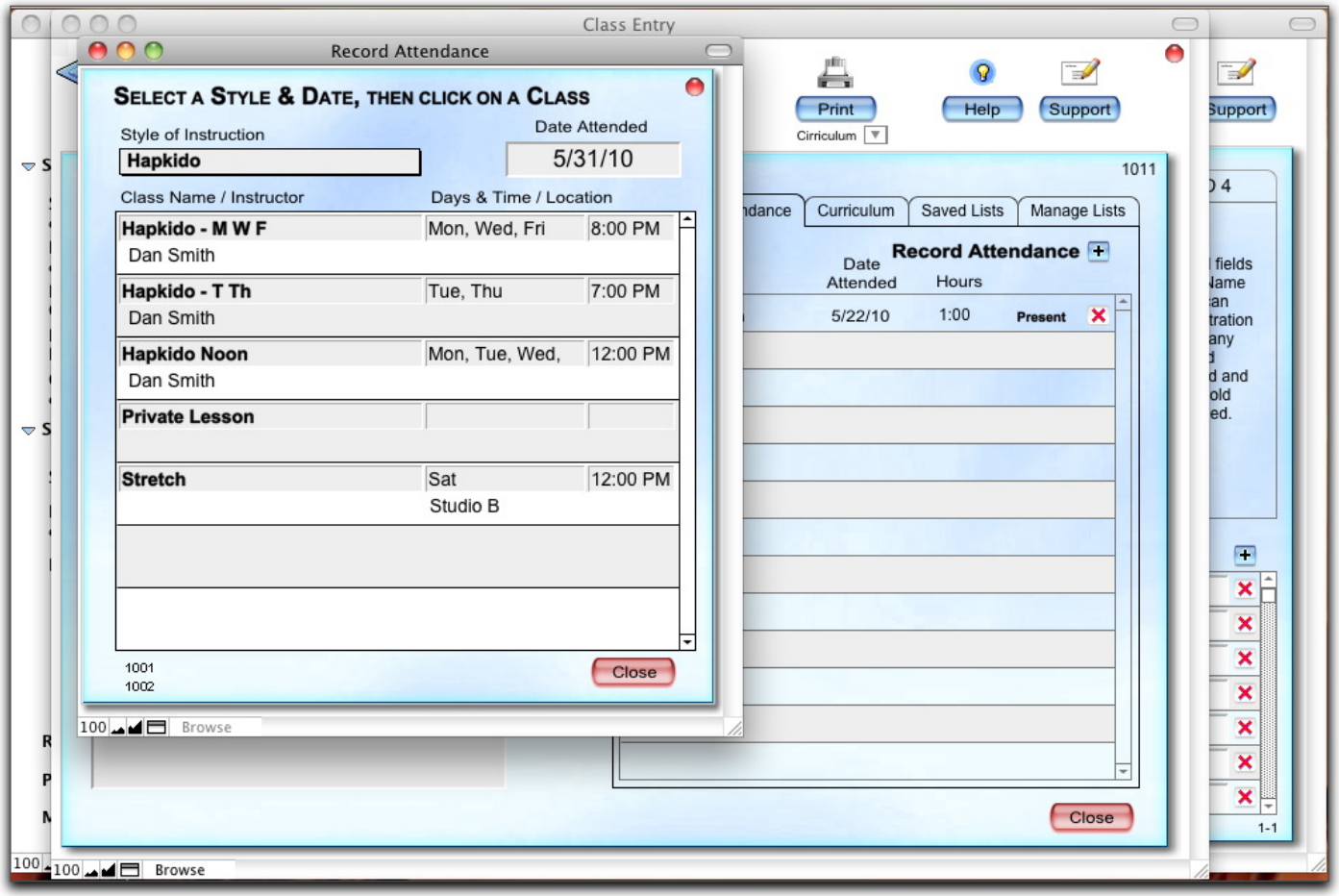
If you wish to clear a drop down field, click into the field twice so the drop down menu is not being displayed and hit the Delete or Backspace key.

There is no Save command. Your data is saved automatically when you switch screens or hit the ENTER key in the number pad area of your keyboard.

To undo changes before they are automatically saved, select Revert Record from the Records menu. If Revert Record is grayed out, the record has already been saved. (Sorry!)

Don’t enter data in ALL CAPS or your form letters will look like ransom notes.

Use the Delete or red X buttons to delete a record. An Admin level password may be required. Record deletion is **permanent** and cannot be undone. You will be prompted to confirm each deletion.



the Studio Organizer allows you to view more than one screen at at time

Understanding Multiple Screens

As you're using the Studio Organizer, you'll notice there are a variety of screens. Sometimes when you click a button a new window will open. When you click the School Info button, you'll see the School Info screen. Click on a style of instruction, and a new window opens displaying a screen that displays the details of that style. Click on a rank or level, and another window opens.

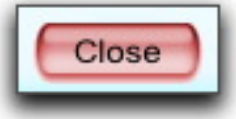
All of this makes the software easy to use -- once you know your way around. But it can also really clutter things up if you have many windows open.

Close button

Here are few things to keep in mind:

If two or more windows are open and you accidentally click on a window you'll activate that window and possibly hide the one you were working on. You may have to move a large window in order to get back to a smaller window behind it.

Windows can also be minimized, in which case you'll see minimized window icons at the bottom of the screen. Click the Maximize button to enlarge a window.



The standard close button displayed on windows is disabled. Instead, click the Close button, or the small red Close dot in the upper right corner of the screen. The main screen containing the major data entry screen has no Close button.

Be sure to click the Close button when you're done viewing a window that has a Close button or red dot. This ensures all data is properly saved and totals are updated.

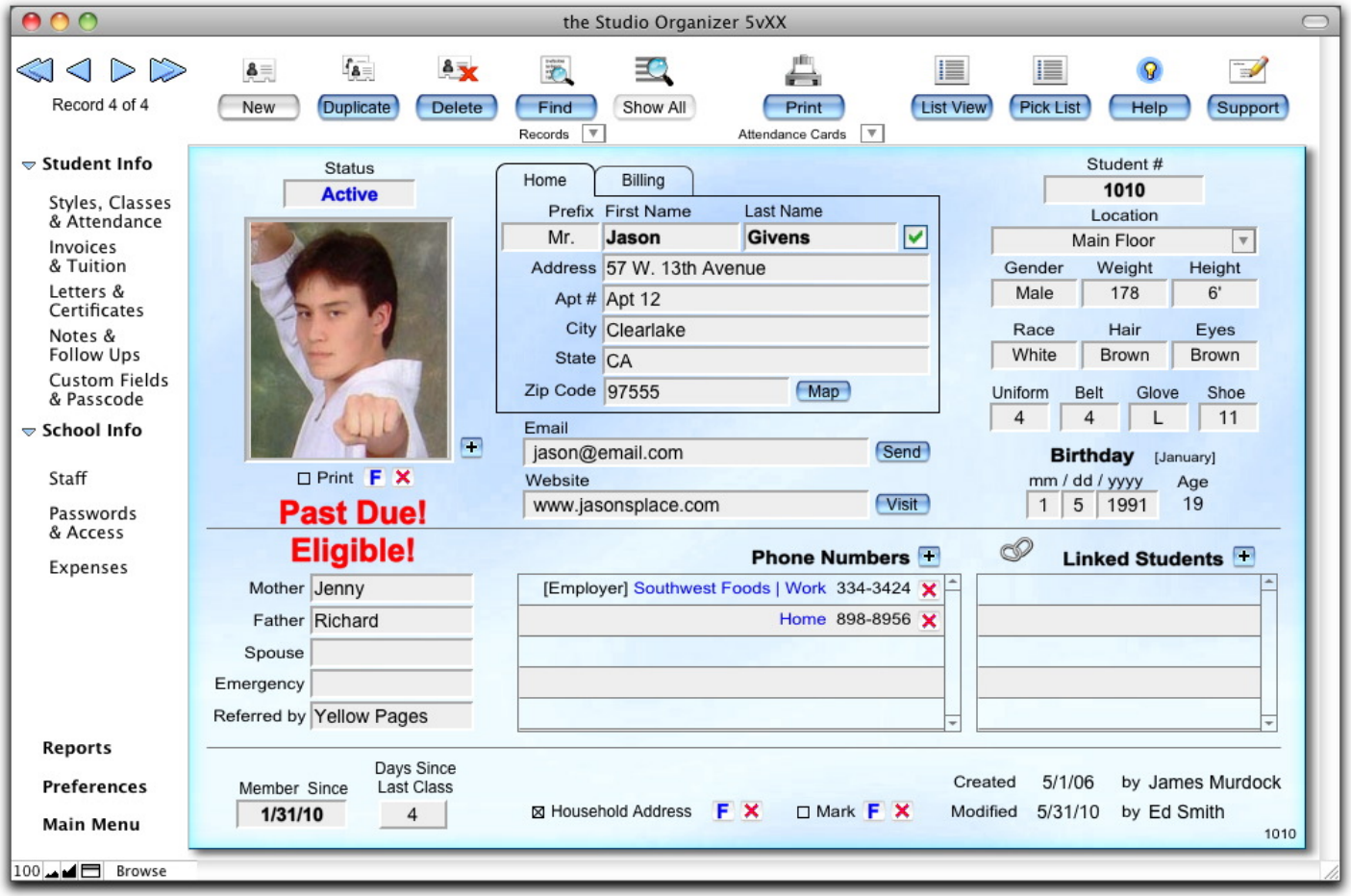
Opening a New Window

If you have a large monitor and you'd like to open one of the major data entry screens in a new window, hold the CONTROL key on your keyboard while clicking a screen name in the left column. For example if you hold the CONTROL key whiling clicking on the School Info screen, a new window will open.

Or select New Window from the Window menu to open the current screen in a new window. This makes it easy to view data from different screens.

To close the new window created, hold the SHIFT key and click any screen name in the column on the left side of the screen.

Student Info



The Student Info screen

Creating a New Student Record

OK, let's start entering students...

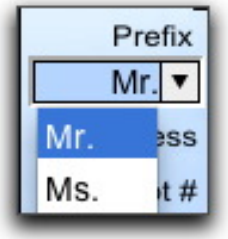
From the Main Menu, single click the Student Info button. It may be called Member Info, Customer Info or Client Info.

To create a new record, single click the New button.
(Remember, all buttons in the Studio Organizer require just a single click. Click twice, and you'll create two new records.)

Student Status
Click on the Status field. This opens the Status selection window. Select a Status by single clicking directly on your choice.

You can create your own Status entries by clicking the + button on this screen. Feel free to add items such as Vendors, Utilities, or anything else you wish. This way you can use the Studio Organizer to record all of your important contact information. (You can enter is 64 quadrillion records, so don't worry about filling up the database.)

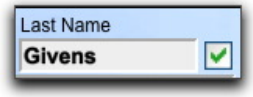
Next, click into the Prefix field and type Mr. or Ms. or whatever you wish. Notice this field has an arrow pointing down. Click on the arrow to display a list of all entries that have been made into this field. If the list is empty, nothing has been entered yet. This is called a *self-populating* drop down list and many fields in the Studio Organizer are self-populating.



Use the TAB key on your keyboard to move to the First Name field. Enter the first name, then TAB again to enter the Last Name.

Remember, don't enter data in ALL CAPS, otherwise your form letters will look like ransom notes!

Checking for Duplicates
If you'd like to be sure you haven't already entered a student into the computer, enter the first and last name then click the check mark button after the last name.



IMPORTANT: If you have a record for Bill Smith, and then enter a new record for William Smith, the Dup check feature won't catch this. Dup check only looks for *identical* first and last names.

Entering Student Information

Using the TAB key, continue to enter the students address, email and web site. All fields are optional.

When you come to the Location field, enter the location this student trains at. The Location field has a self-populated drop down menu. It gets it's values from the Locations which have been entered into the class schedule.

Entering your class schedule is explained in the *School Setup* tutorial. Please be sure to complete the *School Setup* Tutorial before proceeding.

If you wish, enter this student's physical description. Remember, all fields are optional.

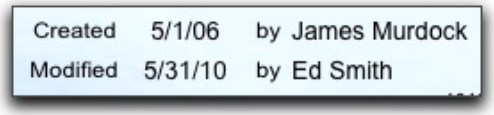
Enter the students birthday. Entering the year is optional. The age will display a ? if the year is blank.

Address Fields

There are two sets of address fields: Home and Billing. On the Student Info screen, click on the folder tab at the top of the screen to switch between them. On the Billing folder tab you can set the default address. The default address is always used first for invoices and labels.

Creation & Modification Info

In the bottom right corner of the Student Info screen, you'll find the date a record was created, and the name of the user who created the record.



There's also a modification date, and the name of the user that changed the record. Any change to any field in this record will cause these fields to be updated.

The creation and modification fields cannot be edited, but you can perform finds in these fields.

Entering Phone Numbers

Phone Numbers
Click the + sign next to Phone Numbers to add a new telephone number. All fields, except the phone number field, are optional. Also the Type field is self-populating. That means it the drop down menu will fill up with the values you enter into the field.

Click Save & Add Another to add another number or hit the Enter key on your keyboard. Click Save to exit.

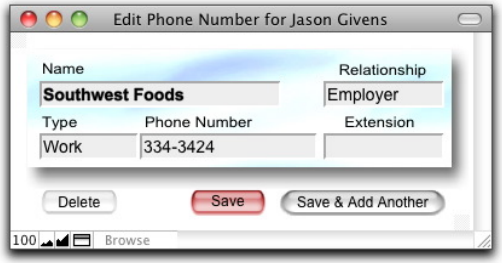
To edit a phone number, single click on the number in the list.

To permanently delete a phone number, click the red X next to the number.
Warning: Deletions cannot be undone.

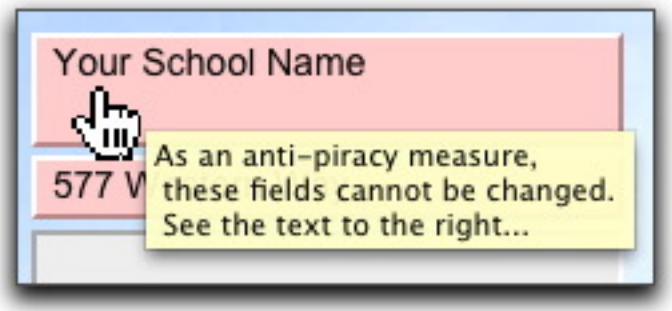
The Save & Add Another Button
If you're viewing a dialog box with a Save & Add Another button, hitting the ENTER key on the number pad area of your keyboard does the same thing as clicking on the button with your mouse.

This has been done to make repetitive data entry faster. Your hands don't have to leave the keyboard to reach for the mouse.

Clicking Save & Add Another saves the current data you've just entered and creates a new record.



Sticky Notes



While you're on the Student Info screen, here's a helpful tip...

As you pause your mouse over a field or button a yellow sticky note will appear providing information about the item.

Move the mouse away from the field to make the sticky note disappear.

Not all fields or buttons have sticky notes.

There is a brief delay before sticky notes are displayed.

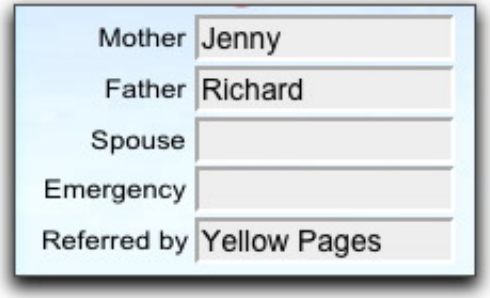
Currently, it is not possible to change the length of this delay or disable sticky notes.

Family Members & Member Since

Enter the student's family information: mother, father, spouse, etc.

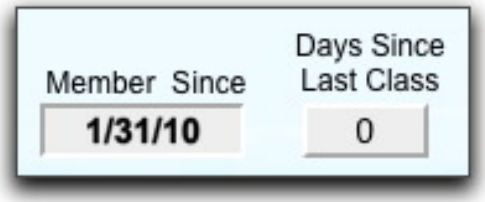
When you enter phone numbers, if you enter mother, father or spouse in the Relationship field, the appropriate Family Member fields will be filled in with the person's name.

You can edit these auto-entries, and auto-entries are only made if the family member field is empty.



Member Since
The Member Since field is automatically set to enter the date the student record was created.

If you would like to change the Member Since date, click into the field and select a different date from the drop down calendar.



Days Since Last Class
The Days Since Last Class field is based on attendance recorded for all styles a student might be attending. It takes today's date and counts backwards to the very last class attended regardless of style.

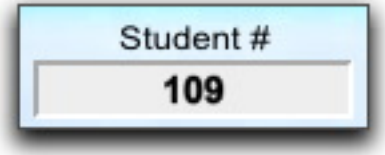
Absentee Preference
It's easy to flag absent students. Just go to the Defaults folder tab of the Preferences screen and enter a number in the *Flag An Active Student As Absent If Student Has Not Attended A Class For X Days* field. If you enter `14`, any active student who has not attended a class in 14 days will have the word *Absent* appear under their photo on the Student Info screen.

Editing Student #'s & Linking Students

Student #'s

It's best to leave the automatically assigned Student # intact. There's no need to modify the Student # unless you have pre printed bar code ID cards or key tags, in which case you can scan the bar code into the Student # field. If you have a special association or membership number, those can be entered into a Custom Field on the Notes & Follow Ups screen.

If you would like to create your own numbering system, go to the Preferences screen and click on the Defaults folder tab. Enter a number into the Next Student # field. Only numbers up to 8 digits can be used. This numbering method is only applied when you click the New or Duplicate buttons on the Student Info screen. This numbering method is not applied when records are imported.



Also, at any time you can manually change a Student #. Here are the requirements:
Student #'s cannot exceed 8 characters.
USE ONLY THESE CHARACTERS
A-Z Upper Case only 0-9 (numerals) - (minus sign) . (period) $ (dollar sign) / (forward slash)
+ (plus sign) % (percent sign)
DO NOT USE THESE CHARACTERS
lowercase letters Space Carriage Return \ (backslash) ; (semicolon) : (colon)

Each Student # is automatically converted to a bar code if the bar code font is installed on your computer. Always print and test your Student # bar codes to be sure they scan properly.

Linking Students

If this student is related to another student or if you would like to be able to connect two or more students, you can *link* them. To do this go to the first student's record and click the + button to the right of Linked Students. A pick list of all students will appear. Use the Status drop down menu at the top of the screen to select which students to view. Single click on the student you wish to link. This student will now be linked to the student you've selected, and vice versa. To view a linked student, single click on the students name in the list.

Linking students is useful when one student might pay the tuition of another student. A father can pay his son's tuition if their records are linked. Be sure to always link family members. To unlink a student, click the X next to the student's name. This does not delete the student's record; it only unlinks the students.

Finding Records

Some database systems use the word *query* but we'll use the term *find* when referring to searching your records.

QuickFind
The QuickFind feature searches all fields at once. Select "QuickFind" from the drop down menu below the Find button and search ALL data fields with one mouse click.

the Find Button
First, be sure to set the drop down menu under the Find button to Records then single click the Find button. You are now in find mode, and you'll notice all the fields appear blank and the screen names on the left have disappeared. This reminds you you're in find mode.

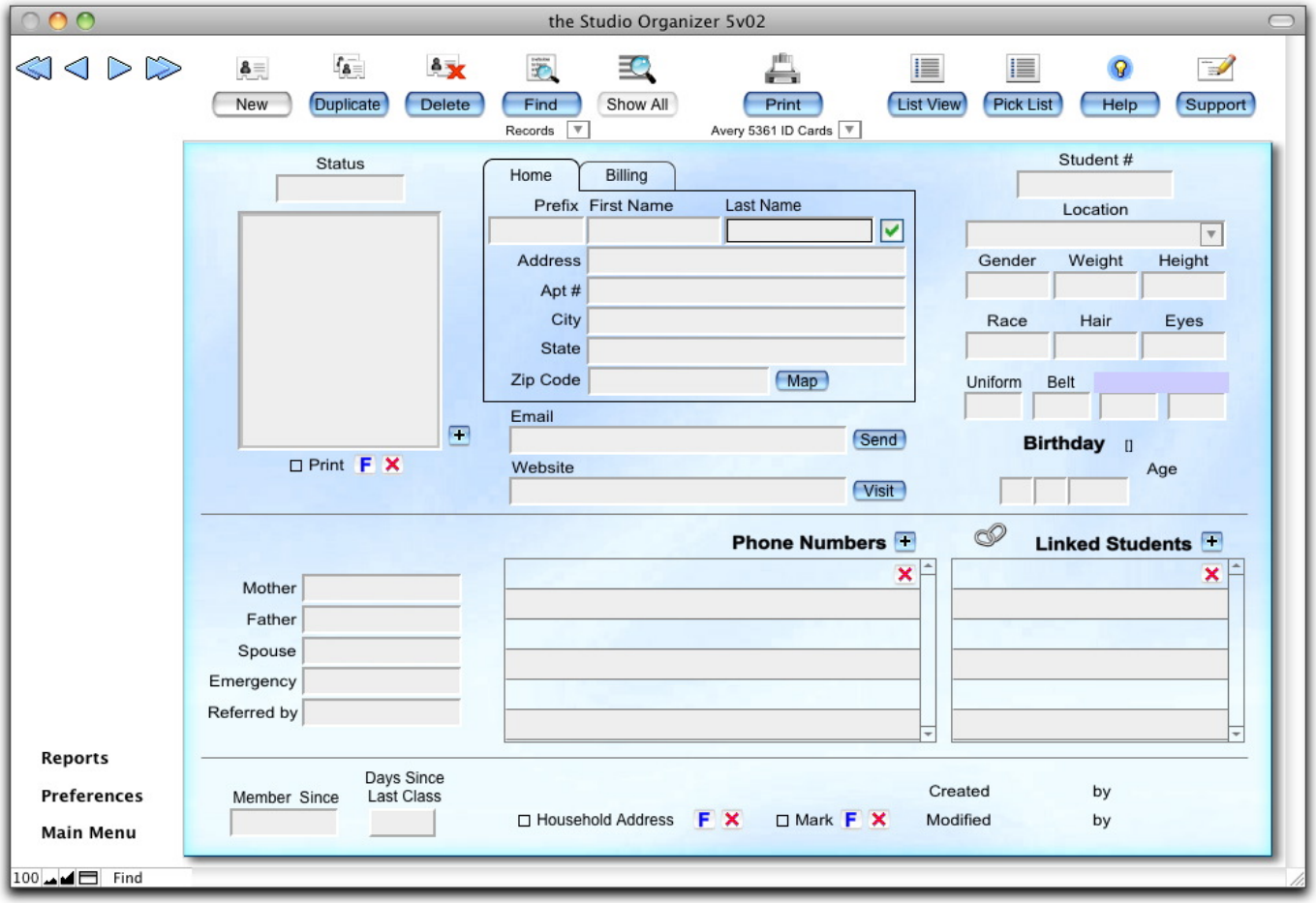
Click into any field and type what you'd like to search for. This is called your *find criteria*. For example, click into the last name field and type Smith. Your find criteria is last name = Smith. To perform the find, single click the Find button again. To exit without performing a find, select Browse Mode from the View menu at the top of the screen, or click the find button again. Do not remain in find mode, otherwise you could mistakenly begin to enter more records. Anything you type while in find mode is not saved.

The Found Set
After successfully performing a find, you create a *found set* which contains all of the records matching your find criteria. After performing a find, take a look at the text under the arrows in the top left corner of the screen; the number of found records is now displayed. This is called the found set. Think of all of the records in your database as a complete deck of cards, and the cards in your hand as the found set.
Once you have created a found set, you can only browse the records in the found set. When you're playing cards, you can only see the cards in your hand. Once you have a found set of records, you can now create emails, do a mass mailing, print envelopes etc. Click the Show All button to undo the found set and browse all records. Think of this as picking up the entire deck of cards and viewing all of them. Also, you should know that when you perform a find, you're searching all records, not just your found set.

Using a Pick List to Find a Student
Another way to quickly jump to a student is to single click the Pick List button, then single click on the students name. No found set is created when using the Pick List button.

Find Matching Records
Here's a useful tip for searching for data in fields. Click into a field and highlight some text. This becomes your find criteria. Next, right click (PC) or Control click (Mac) and select Find Matching Records from the contextual menu that appears. This will find all records that match the find criteria in the field you've selected and create a found set.

Finding Records



The Student Info screen in Find Mode

Once you've created some student records, click the Find button to search your data.
Enter your find criteria, then click the Find button again to search your records.

Printing the Found Set

IMPORTANT!
This is a something you'll want to be sure everyone who will be using the Studio Organizer understands.
This is a very common tech support question, so please read this information carefully.

Once you have successfully performed a find, you now have a *Found Set*.
Understanding the found set is very important when it's time to print. There are two options in your print dialog box:

Records Being Browsed
Select this option to print the entire found set.
If you have not performed a find and do not have a found set, all records will be printed.

Current Record
Select this option to print only the *one* record you're looking at when viewing a form, or if you're viewing a list or report, the current record is the one with the black bar on the far left side.

Invoices are the Exception
Always select *Records Being Browsed* when printing invoices.

Macintosh Users
In order to see the *Records Being Browsed* or *Current Record* option it may be necessary to select the Studio Organizer or FileMaker Pro from a drop down menu in your print driver software.

the Preview Button
Many reports and screens have a Preview button. Click this button to see how the report or screen will print. This is important because some reports will print slightly differently than what you are seeing on the screen. This is especially true if a report has a variety of sorting options, or subtotals by category, class, date, etc.
Try different sorting options then click the Preview button to see how report will print.

the Household Address & Mark Check Boxes

the Household Address Check box
On the Student Info screen there's a check box in the bottom middle labeled Household Address. It's checked by default whenever you create a new record.

Leave that box checked for the primary contact at an address and uncheck the Household Address box for any other students also at this address. This check box is useful for mailing purposes. If you have several family members at the same address you will probably only want to send one letter per household. For example, if Bill Smith and his two sons attend classes together, keep Bill's Household Address box checked, and uncheck the box in both of this sons records.

Click the blue F button to create a found set of only those records that have the Household Address box checked. Once you have a found set you can send emails, create mailing labels, send form letters, print envelopes, etc...

To clear the Household Address check box for all records click the red X.

the Mark Check box
On the Student Info screen there's a check box in the bottom middle labeled Mark.

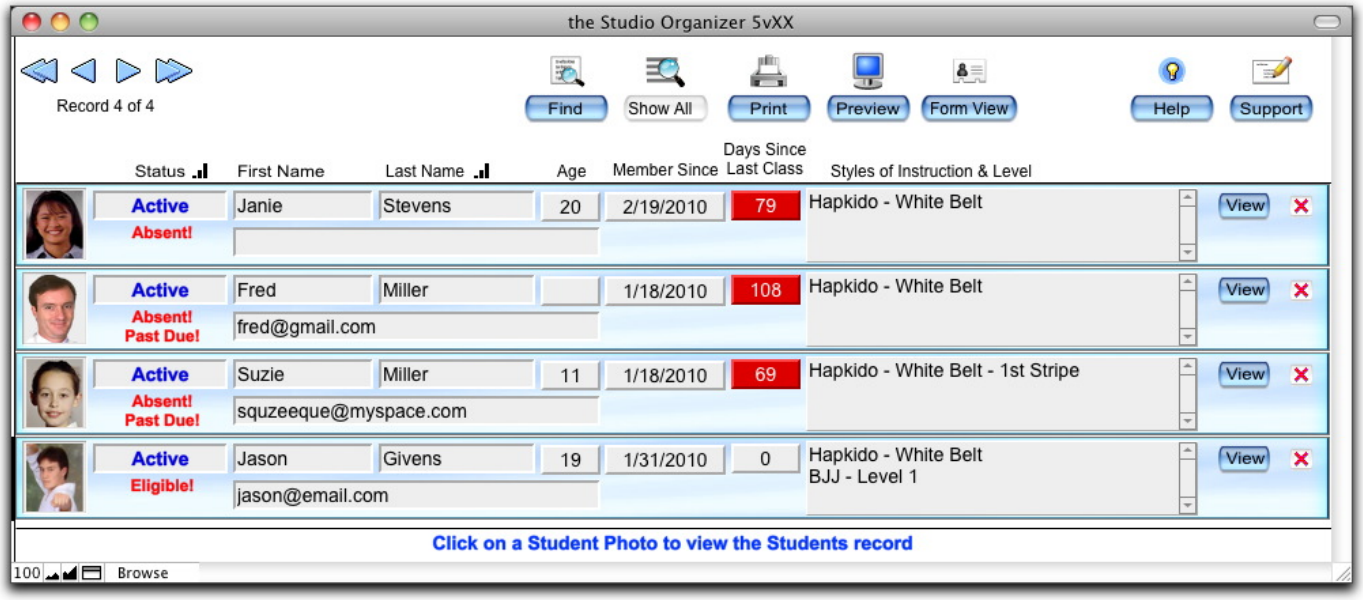
This box can be used if you're browsing through your records and want to select a random group of students and create a found set.

For example let's say you want to send a letter to all the kids that are friends of Jimmy Brown. Well, there's no way to search your records for "friend of Jimmy Brown" so you search or browse for individual students and check the Mark box when you find a friend of Jimmy. Now search your records for all students with the Mark box checked by single clicking the blue F button. This will create a found set of only these records that have the Mark box checked.

Once you have a found set, you can send emails, create mailing labels, send form letters, print envelopes, etc.

To clear the Mark check box for all records, click the red X.

the List View



Viewing Your Data
There are two ways to view your data: *View as Form* and *View as List.*

On the Student Info screen, single click the List View button at the top of the screen to view your student records in rows. To return to the form view, click on a student photo or the View button on the far right. You can also click the Form View button at the top of the screen.

You only have to enter data once in a form and it's automatically entered into list views. Most of your data entry screens use View as Form which displays only one record on your screen. Most reports use View as List. When viewing a list the black bar on the left indicates which record is active. Click into a record to make it the active record.

Sorting by Status or Last Name
When viewing the student records as a list, click on the sort buttons next to the status and last name headings at the top of the screen to sort the list. Status will sort by status, then last name, then first name. Sorting by last name will sort by last name, then first name.

Inserting Student Photos

Now let's learn how to properly insert student photos into the Studio Organizer.

Please Read Carefully...
It's important to store your original student photo images inside the Student Photos *folder. Failure to do so will result in missing images after updating to a new version or transferring your data between school and home.*

You'll begin this process by taking a photo with your digital camera. Web cams tend to have wide angle lenses, so for best results use a digital camera and step in close to fill the frame with the students face.

Set your camera to the lowest resolution available. It's important to keep files sizes as low as possible. Using large images will cause slow refresh rates when viewing records, especially for network users.

Find good lighting and take a few pictures. This image is going to seen every time the student takes out their ID card so do your best to take a quality photo. The size of the photo image is 150 pixels wide by 180 pixels tall. Photos should be 300 KB or less.

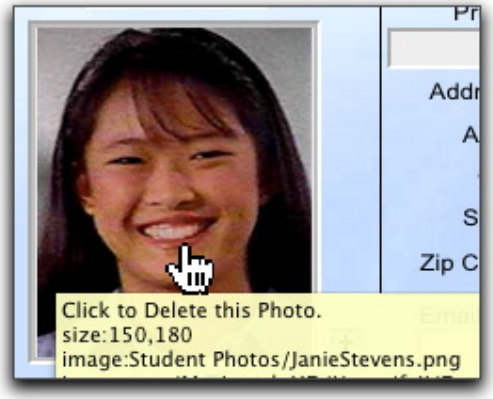
Next, transfer the photo from your digital camera to the *Student Photos* folder inside the *Studio Organizer* folder installed on your computer's hard drive. The default location for the Studio Organizer folder is your Desktop.

Network users: The shared *Student Photos* volume should be mounted as described in the *Networking* instructions in the *Working with Data* tutorial.

Now open the Studio Organizer and go to a students record. Click on the empty photo field or click the + button. If the *Student Photos* folder is empty or contains less than 100K of data, you will not be able to insert photos. Select the correct photo file from the *Student Photos* folder. Be sure to leave the "Store only a reference to the file" box at the bottom of the screen checked, then click the Open button to insert the image. If the image file you've inserted is not stored in the *Student Photos* folder, you will receive a warning message asking you to delete the photo.

Once you've inserted student photos do not move or rename the *Student Photos* folder or your data files. This will break the link to the photos and they will have to be reinserted.

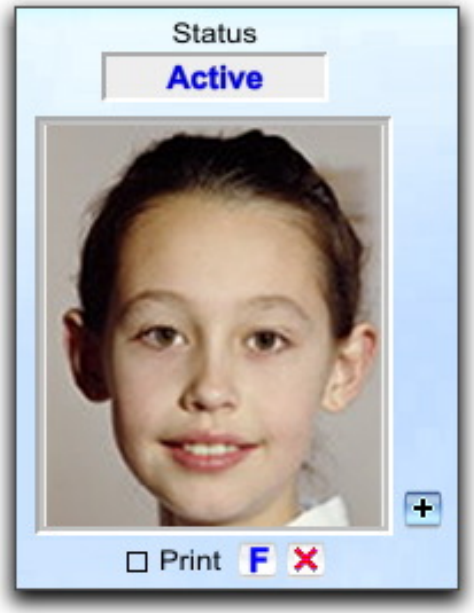
Deleting a Student Photo
If you have Admin access, you can delete photos. Staff access does not have permission to delete photos. Go to the record you wish to delete and click on the photo, then click Delete. To delete all photos, click Delete All. Photo deletion is permanent and cannot be undone.



Viewing Photo Information
Hold the mouse over a student or staff photo until the yellow sticky note is displayed. The sticky note will display information about the original file, such as it's size and location.

the Print Check Box
On the Student Info screen there's a Print check box under the student's photo. This box is automatically checked when a new record is created to remind you that this student's ID or attendance card needs to be printed. To find all records with the Print box checked click the blue F button.
Click the red X to clear the Print check boxes in all records.

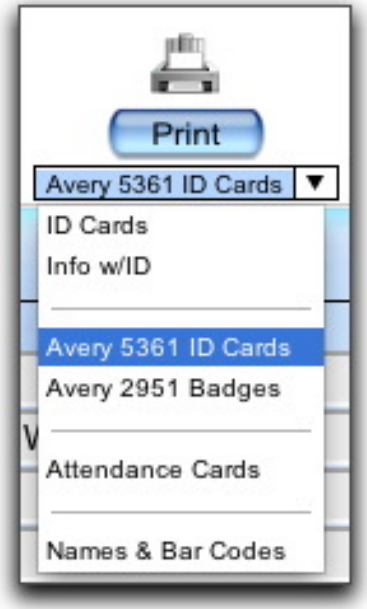
Let's say you sign up several students during the week, and you want to print out all of their Student ID's or attendance cards at one time, rather print them separately. When it's time to print the ID or attendance cards, go to the Student Info screen and be sure you have at least one student record with the Print box under the student photo checked.



Next, make a selection from the drop down menu below the Print button, which is located at the top of the Student Info screen. For example, you can select the type of ID card or attendance card you wish to print. Click the Print button. A dialog box will appear asking which students you'd like to print, for example all students with the Print box checked. Make a selection to display the cards that will be printed. You can review these cards, and when you're ready click the Print button. When printing, be sure to select *Records Being Browsed* to print the entire found set of records.

After printing has been successful, click the Close button. You will be asked if you would now like to clear the Print check box for this group of students. If all cards printed successfully you will want to clear the Print check box. Otherwise leave the Print box checked if you wish to include these students the next time you print cards.

Student ID Cards

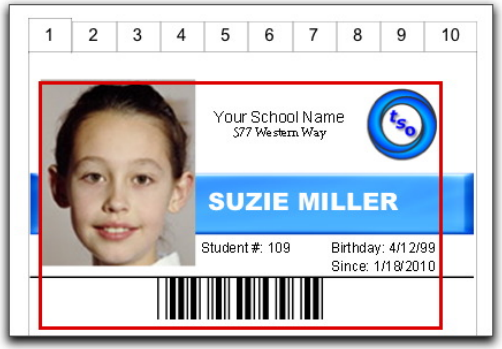


The Studio Organizer includes 10 Student ID card designs. If a student photo has not been inserted into the students record, the school logo will appear in place of the photo. To view the ID cards, go to the Student Info screen and click on the drop down menu below the Print button at the top of the screen.

Select **Avery 5361 ID Cards, Avery 2951 Badges** or **ID Cards** from the drop down menu then click the Print button. This will display the ID cards. Click on the numbered folder tabs at the top of the ID card to view the different designs.

The **Avery 5361 Self Laminating ID Cards** are special card stock that can be purchased from your local office supply store or online. They will work with both ink jet and laser printers, however with laser printers be sure the page is fed through the multipurpose tray and a heavy paper stock is selected in the print driver software. The 5361 uses a standard 8.5" x 11" page and prints three IDs per page. To laminate, simply remove the ID from the card stock and fold the laminate over the face of the card.

Select **ID Cards** if you'd like to print to blank paper. You don't need any special type of paper, however using 110 pound card stock is a nice touch. ID cards print 8 per page if you're using a horizontal design, and 6 per page if you're using a vertical design. Select an ID design you like then click the Print button. Use the hash marks and a paper cutter to separate the cards. You can laminate these ID cards using 3M Scotch Business Card / ID Protectors (LS851.)



The **Info with ID** prints on standard paper and is a full page print out of a students essential information and the page includes an ID card. You can clip the ID card from the page or leave it intact.

Avery 2951 Self Laminating ID Cards have been discontinued by the manufacturer but are still supported in the Studio Organizer.

After you have successfully printed your cards click the Close button to return to the Student Info screen. You will be prompted to clear the Print check box for these students. You can also click the red X under the Student Photo on the Student Info screen to clear all the Print check boxes.

Editing Information on Student ID Cards

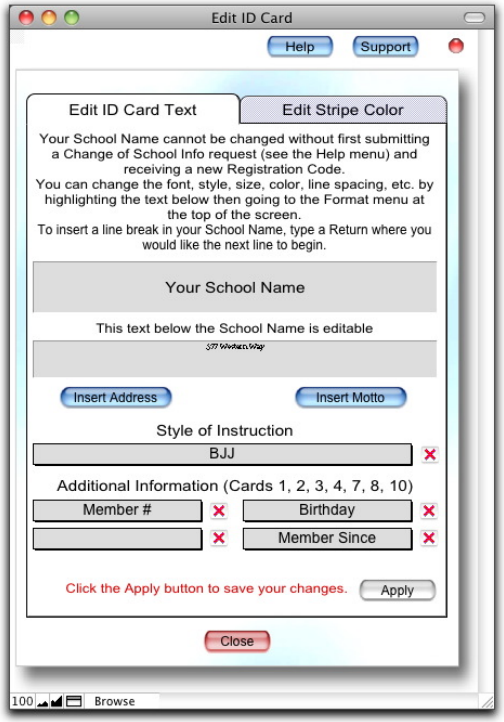
You can change the information displayed on the Student ID cards. To edit the ID card just click on the school address when viewing an ID card, or click the Edit ID Card button if you're viewing an Avery ID Card. If either the school name or address fields are incorrect or empty, click the Apply button to reset these fields to their defaults.

You can also change the font, style, size, color and line spacing of the school name by highlighting the text then going to the Format menu at the top of the screen and making selections from that menu. In order to see the changes you have made click the Apply button.

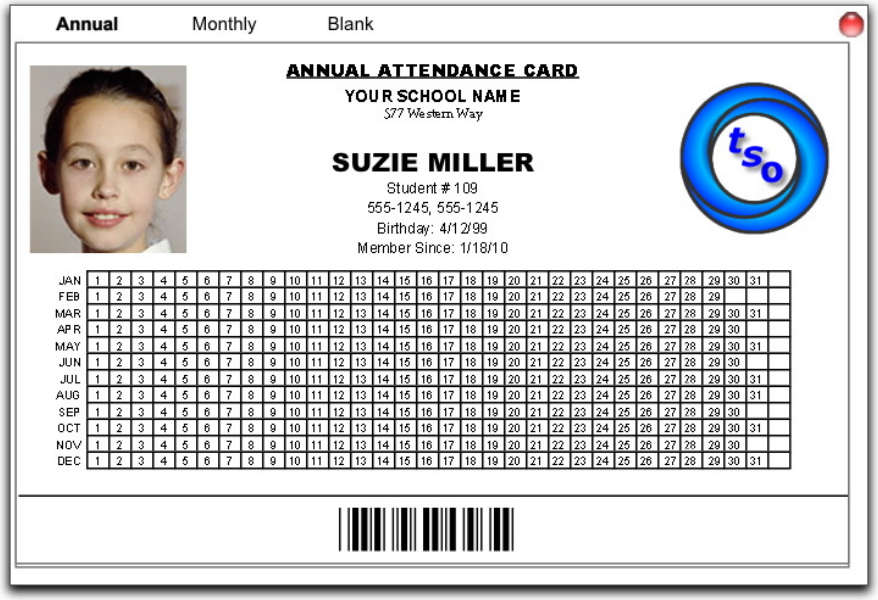
When it comes to font spacing, what you'll see on the screen will often be different than what actually comes out of your printer. If the spacing looks wrong on screen, print the ID card to see the actual results.

You can also change the line breaks in the school name. Just type a RETURN in the school name where you'd like a new line to begin. Do not attempt to change the school name. Changing your school name will require a new Registration Code.

The text field below the school name is customizable. Use the buttons to enter the school address or motto. You can also leave this field blank or enter anything you wish. You can change the font style, size, color and spacing of this text by highlighting the text then going to the Format menu at the top of the screen. In order to see the changes you have made single click the Apply button.


Edit ID Card
Help
Support
Edit ID Card Text
Edit Stripe Color
Your School Name cannot be changed without first submitting a Change of School Info request (see the Help menu) and receiving a new Registration Code.
You can change the font, style, size, color, line spacing, etc. by highlighting the text below then going to the Format menu at the top of the screen.
To insert a line break in your School Name, type a Return where you would like the next line to begin.
Your School Name
This text below the School Name is editable
Insert Address
Insert Motto
Style of Instruction
BJJ
Additional Information (Cards 1, 2, 3, 4, 7, 8, 10)
Member #
Birthday
Member Since
Click the Apply button to save your changes.
Apply
Close
100
Browse

Attendance Cards



There are several different attendance cards for you to choose from. To view them, go to the Student Info screen and select Attendance Cards from the drop down menu below the Print button, which is located at the top, middle of the Student Info screen. Then click the Print button.

Now you'll see the first attendance card design. Click on the words Monthly or Blank to view the other designs. Select the card you like, then click the Print button.

None of your recorded attendance data is included on these cards. These are for manual attendance recording only.

You don't need any special type of paper to print attendance cards, but 110 pound card stock will make the cards more durable. Use a paper cutter to quickly separate the cards.

If a student photo has not been inserted, the school logo will appear in place of the photo.

After you have successfully printed these cards, click the Close button to return to the Student Info screen.
You will be prompted to clear the Print check box for these students.

You can also click the red X under the student photo field to clear all the Print check boxes.

Buttons on the Student Info screen

the Duplicate Button
Click the Duplicate button to create a copy of the current student's record. The student #, linked students, invoices, letters, styles of instruction, classes and attendance are not duplicated.
This is useful for students from the same family, since much of their information will be similar.

It normally is not necessary to create two records for one student since students can be enrolled in more than one style of instruction or class.

Deleting a Record
If you have Admin access, you can delete student records. Staff access does not have permission to delete student records, and has restricted record deletion access in other areas.

Go to the record you wish to delete and click the Delete button.

To delete more than one record, search your records then click the Delete button and click Delete All.

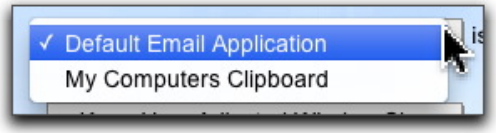
WARNING!
Record deletion is **permanent** and cannot be undone.

the Pick List Button
To quickly jump to a student without having to perform a find, click the Pick List button at the top of the Student Info screen. Or you can click the Find Student button on the Main Menu.

A list of student names will appear. There's a drop down menu at the top for selecting the status of the students you wish to view. Single click directly on a student name; the students' record will be displayed. A found set is not created.

Printing Names & Bar Codes
Just below the Print button on the Student Info screen there is a drop down menu. Select Names & Bar Codes then click the Print button to print a list of student names with their Student # as a bar code. Keep this list by the attendance recording computer in case a student forgets their ID card.
Students can also check into class by typing their passcode, but they will need access to the keyboard to do so.

Sending a Single Email



To send a single email to a student or employee, first be sure a valid email address is entered into the Email field on the Student Info or Staff screen. Also, your default email application should be open and running.

To send a single email, single click the Email button. Emails created using the Send button are not stored in the Studio Organizer.

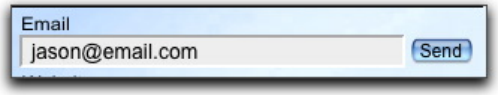
On the General folder tab of the Preferences screen, you select whether your *Default Email Application* will be used to send the email, or if the text of the email will copied into your *Computers Clipboard* where it can then be pasted into a new email message you will create.

If you're using America Online, gmail, Yahoo, Hotmail, or an email service that you check by opening a web page, you'll want to select My Computers Clipboard.

If you use Outlook Express, Entourage, or OS X Mail, you'll select Default Email Application.

Invalid Email Addresses

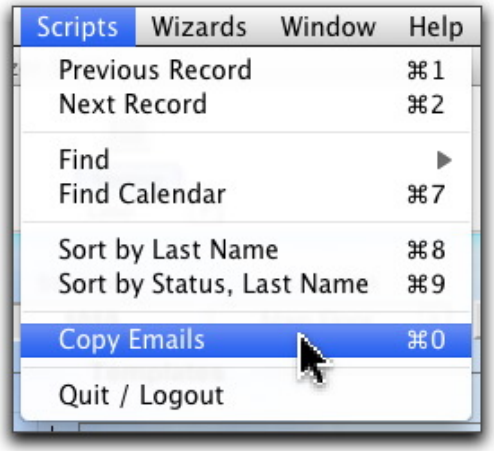
If an email address is invalid, or blank, your email software will provide the appropriate warnings.



The Studio Organizer doesn't verify email addresses.

Sending Many Emails

IMPORTANT!
How your computer handles email is determined by your email preference setting on the General folder tab of the Preferences screen and the email software you use.



There are two options for sending multiple emails.

Copying Email Addresses
To send the same email to many students, you can *copy* a number of email addresses so you can then *paste* them into the To: field of a single email message. First search your records for everyone you wish to email.

To find every student that has an email address entered, single click the Find button, type an asterisk (*) into the Email field. Then single click the Find button again. The asterisk is a wild card that searches for *any* characters. See the *Finding Records* for more details.

Once you have a found set, select Copy Emails from the Scripts menu. Then switch to your email software, create a new message and paste the addresses into the TO, CC or BCC field.

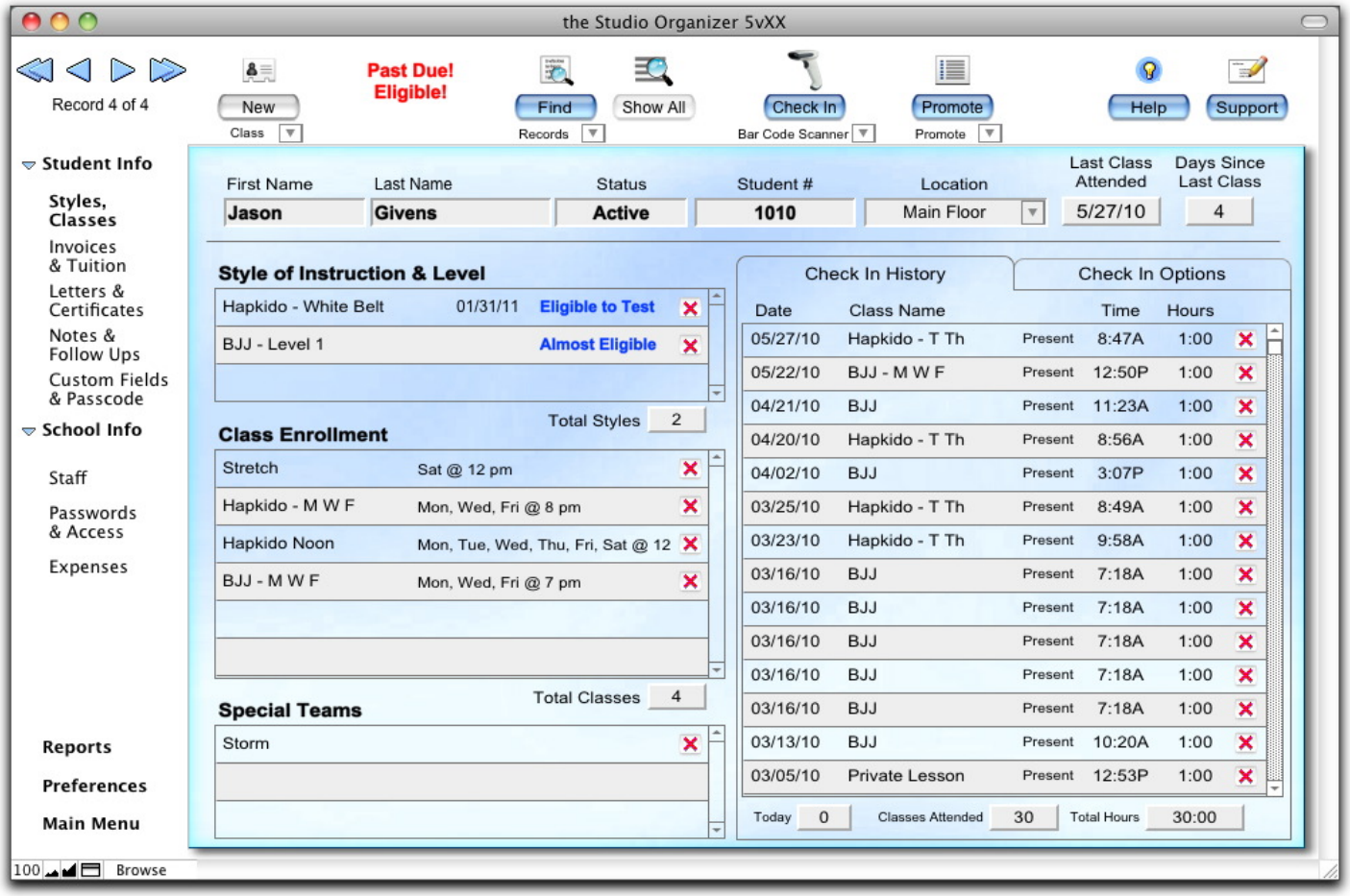
This function only works on these screens: Student Info, Styles, Classes & Attendance, Invoices & Tuition, Letters & Certificates, Notes & Follow Ups, and Staff. Emails created using the Copy Emails script are not stored in the Studio Organizer.

Emailing a Mass Mailing
You can create customized emails for each student that include merge fields that will insert the student's name, rank, etc. When you create a letter or mass mailing, you have the option of emailing your letters. Click the Email button on the letter or envelope screen.

If you're viewing more than one letter, you'll be asked if you'd like to email just the current letter, or all of them. You'll also be asked if you'd like to Send the letter immediately, or view it. Viewing a letter lets you verify the message and even add an attachment if you wish.

Emailed letters are stored in the Studio Organizer, as well as your email software.

Styles, Classes & Attendance



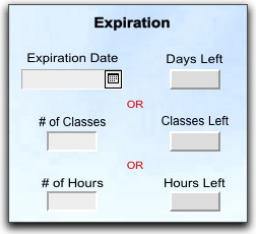
the Styles, Classes & Attendance Screen

Style of Instruction

Let's move on the Styles, Classes & Attendance screen. Click on the Styles, Classes & Attendance text on the left side of the screen. First we'll enroll a student in a style of instruction.

In order to enroll a student in a style of instruction, you must first enter your styles of instruction and skill levels on the School Info screen. This is explained in the *School Setup* tutorial. Please complete the *School Setup* tutorial before proceeding.

To enroll a student in style and select his rank, set the drop down menu below the New button in the top left corner to Style, then single click the New button. (You can also click directly on the Style of Instruction & Rank text.) Select a style of instruction from the drop down menu at the top, then single click directly on the rank name. The *Style Details* screen is now displayed. This is a very important screen; it will contain your students entire rank history and contains a great deal of essential information.

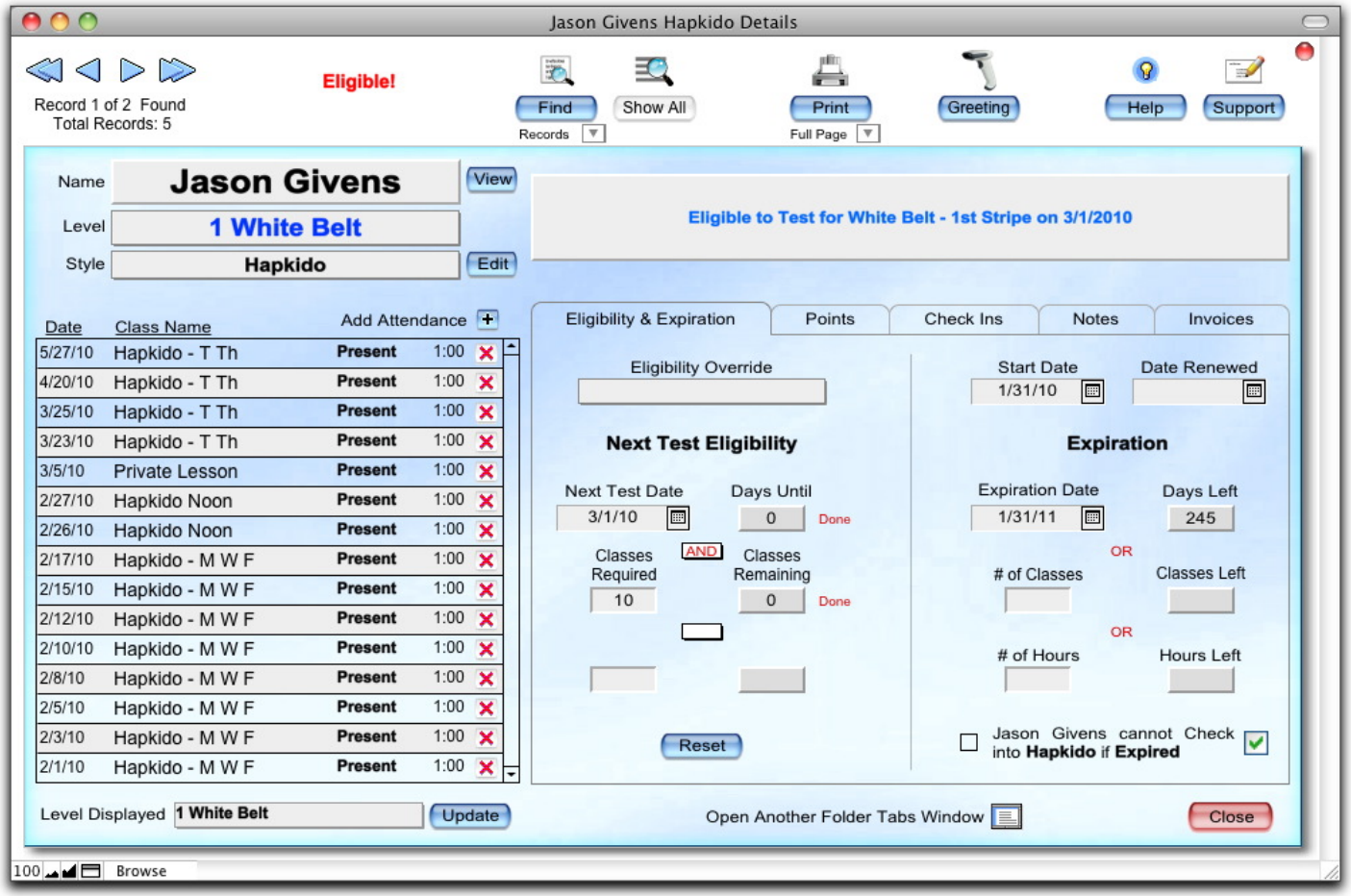


Here are the folder tabs on this screen:

•The Eligibility & Expiration folder tab contains fields that determine if a student is approaching a test or is about to expire. This information will be displayed on the attendance greeting screen or under under the students photo.
• The Check Ins folder tab contains a attendance totals and let's you limit the number of times a student can check into classes.
• The Points folder tab is where you'll record the tasks this student must perform to be eligible to test, or enter scores or evaluations for performances.
•The Notes folder tab allows you to create notes and follow ups. You can also record the students Contract # and enter a custom note for this style & student only.
•The Invoices folder tab displays all of the students invoices.

Once you've recorded some attendance, only the attendance dates for the Rank Displayed will be shown.
To view previous ranks, select a lower rank from the Rank Displayed drop down menu in the bottom left corner of the screen, then click the Update button.

You can add another style of instruction if a student is training in more than one style. There is no limit to the number of styles a student can be enrolled in, but a student should only be enrolled *once* in each Style.

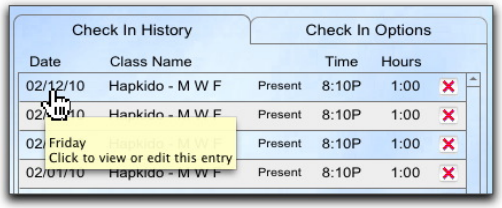


the Style Details screen

The next few pages will explain some of the fields and features of the Style Details screen...

Displaying Day Names

The attendance recorded for this student is displayed in a column on the left side of the Style Details screen. To see the name a date attended hold the mouse over an attendance date field until the sticky note is displayed.



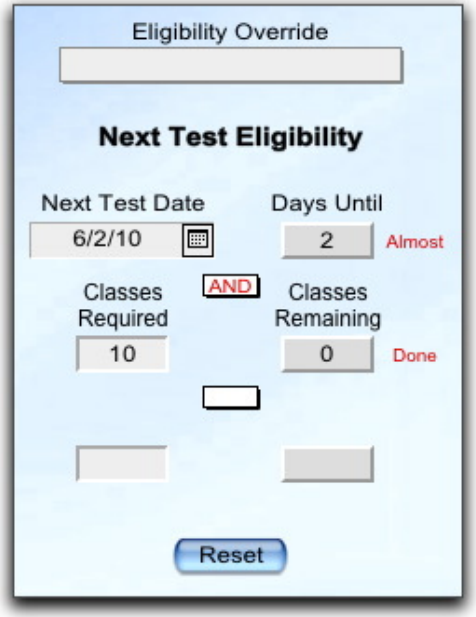
This feature is also available on the date and time fields of the Check In History folder tab of the Styles, Classes & Attendance screen.

Next Test Eligibility

The Next Test Eligibility fields are based on the requirements entered for each rank.

Entering your styles and ranks is explained in the *School Setup* tutorial. Please complete the *School Setup* tutorial before proceeding.

The Next Test Eligibility fields are displayed on the Style Details screen on the Eligibility & Expiration folder tab.



If you need to change any of the Next Test Eligibility fields, you have two options. You can change just this students Next Test Requirements by clicking into the fields and making changes.

OR

You can click the Edit button next to the name of the style in the top left corner of the screen and the Style & Rank setup screen is displayed. Now you can edit the Next Test Requirements for a rank. Make your changes, then click the Close button.

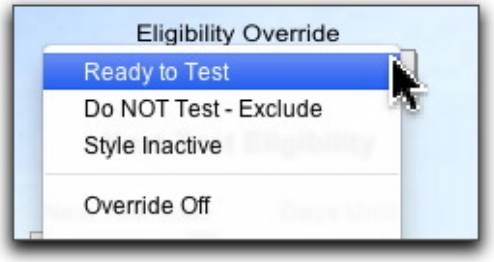
To apply these changes, single click the Reset button on the Eligibility & Expiration folder tab. You can choose to Reset many students or just the current student.

If you would like to disregard the Next Test Eligibility fields, use the Eligibility Override field to manually make a student eligible or ineligible.

Eligibility Override

When viewing the Style Details screen you can use the Eligibility Override field on the Eligibility & Expiration folder tab to manually change a student testing status.

Ready to Test
Select this option to make a student eligible to test regardless of the Next Test Eligibility fields.



Do NOT Test - Exclude
Select this option to make a student ineligible for testing regardless of the Next Test Eligibility fields.

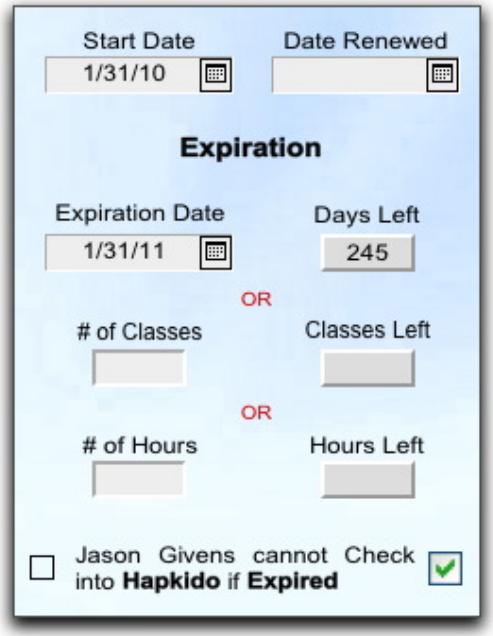
Style Inactive
Select this option if a student is no longer training in this style and it should not appear in any future promotion lists or reports.

Override Off
Select this option to disable any previous selections made to the Eligibility Override field or you can clear the field by clicking into it, then hitting the DELETE or BACKSPACE key twice. Eligibility to Test is once again determined by the Next Test Eligibility fields.

Expiration Fields

Start Date
When a student enrolls in a style of instruction you can record his Start Date on the Style Details screen on the Eligibility and Expiration folder tab. Click into the field and select a date from the drop down calendar.

Date Renewed
When a student renews a style of instruction you can record this date on the Style Details screen on the Eligibility and Expiration folder tab. Click into the Date Renewed field and select a date from the drop down calendar.



Expiration Fields
You can set a expiration date for a student's enrollment in a style of instruction. You can also enter the number of classes or hours a student can attend before expiring.

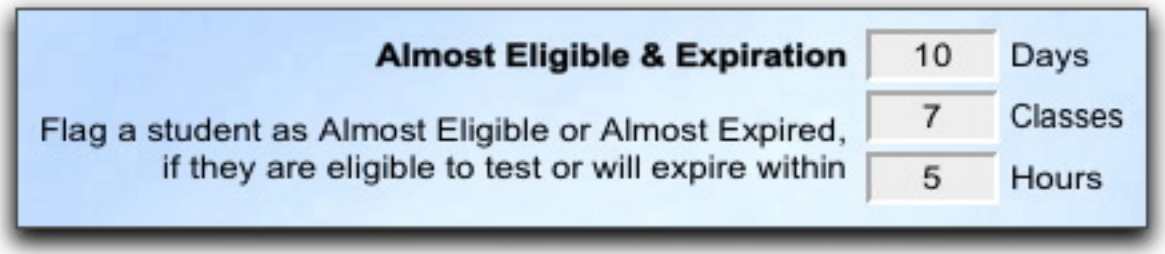
The Class Left field is calculated by taking the total classes attended in this style and deducting the value entered in the # of Classes field. If a student purchases 10 more classes, add 10 the value in the # of Classes field, or edit the field so 10 appears the Classes Left field. The same applies to the Hours Left field.

The Studio Organizer will automatically flag almost expired and expired students for you. For example, the words Almost Expired or Expired will appear in large red letters under the students photo and in other places. You can also search your records or create reports for expired and almost expired students.

Expired Student Cannot Check In
If you wish to prevent a student from checking into class if they are expired, check the *<Student Name> Cannot Check into <Style Name> if Expired* check box at the bottom of the Eligibility & Expiration folder tab on the Style Details screen.

If this box is checked and the student has expired, when this student checks into class an *Access Denied* message will be displayed. You can control how the software responds when a student is denied access. Go to the Preferences screen and click on the Attendance Check In folder tab. There are powerful options such as *Do/Do Not Halt Check In, Do/Do Not Require Password* and *Do/Do Not Record Attendance.*

Almost Eligible & Expiration Fields



The Style Details screen will display Almost Eligible or Almost Expired if a student is nearing a their next test, or expiration. Setting the defaults for these fields was discussed in the School Setup tutorial, but it's useful to point out that you can click the Edit button next to the Style name to open the Styles & Ranks screen, then click on the Style Preferences folder tab.

The Almost Eligible & Expiration fields on the Style Preferences screen allow you to determine when a student is approaching expiration or his next test. You can select when a student will be flagged as almost eligible or almost expired by entering a number of days, classes and/or hours. This is a very powerful feature which will warn you in advance if a student is about to expire. It will also help you prepare students who are close to meeting their test requirements. Here are some examples:

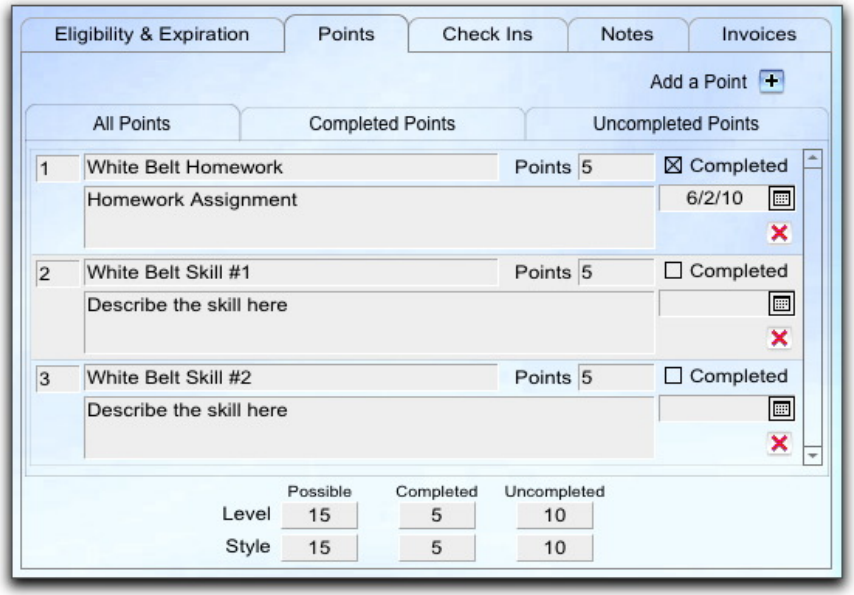
If you enter 5 into all of the Almost Eligible & Expired fields, any student who is within 5 days, classes or hours of expiring will be flagged as *Almost Expired*. This text will appear under their photo, on the attendance greeting screen, and in other places. These students will be included in the *Expiration* report.

Students who are within 5 number of days, classes or hours of a test will be flagged as almost eligible to test and they will be included in the Promotions Test List and Promotions Wizard.
If AND is used between two rank requirements, the student must be almost eligible for both requirements before he will be flagged as almost eligible. If OR is used, when either requirement is met the student will be considered almost eligible.
A student is considered almost eligible when he has completed 75% of the required points.

A student becomes eligible to test when the next test date arrives, or they have completed the required number of points, days, classes or hours.

The entries that you make in the Almost Eligible & Expiration fields on the Style Preferences folder tab on the Style & Rank screen will apply to every rank in this style of instruction.

the Points Folder Tab



The Points folder tab on the Style Details screen is where you'll keep track of the points this student has completed, or record scores or evaluations for performances. Points can also be requirements a student must complete that don't relate to days or time. Points could be skills to be learned, a written test, a homework assign, or a task to be completed.

Single click the Add a Point button to open the Point Entry screen and create a new point. If there are existing points for this rank, you'll be asked if you'd like to add all of them. Click Add All to add all points for the current rank to this student's Style Details record. Click Add One if you'd like to create just one point. You can create a unique point, or choose an existing point by single clicking the small blue arrow to the right of the Title field and selecting a point. It's not possible to select points from other styles or ranks.

You can edit a point by clicking the Edit button. If you make changes to original point record, be sure to click Apply Changes if you would like all students or classes using this point to have the new information.

Use the Record Points Wizard to quickly record Points for many students.

the Points Wizard

The Record Points Wizard allows you to quickly and easily record points for a group of students. Go to the Wizards menu at the top of the computer screen and select Record Points. A find dialog box will appear to let you choose a group of students. Select a class, date range or rank, then click the Continue button to display the Points Wizard screen.

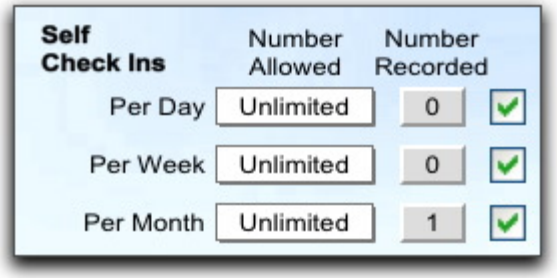
At the top of the Points Wizard screen, select the point you wish to record for these students. All points for all styles and ranks are displayed in the blue drop down menu at the top of the screen. Since you may have points with similar names, after a point has been selected the style, rank and point value are displayed in highlighted text in the top right corner of the screen.

Click the Edit button if you wish to change the original point record. Be sure to click Apply Changes if you would like to update all students and classes using this point. Do not click Apply Changes if you do not want to save these changes for students who have already completed this point.

Once you have a point selected check the blue box for each student who has completed this point. The Date Completed and Point Value fields are automatically entered, but these fields can be edited. Use the Check All or Uncheck All to quickly make changes to all blue boxes. For example, if almost every student has completed this point, click Check All then uncheck the students who have not completed the point.

When you're ready to record this point for all checked students, click the Record button. If you need to start over, click the Reset button.

Last Test Passed & Self Check Ins



Next let's take a look at the Check Ins folder tab. Most of the fields on this screen are automatically calculated statistics. They cannot be modified, but you can perform Finds in these fields.

Last Test Passed
On the Check Ins folder tab of the Style Details screen you'll find the Last Test Passed field. This field is automatically filled in when you use the Promotions Wizard to record promotions. You also can manually enter a date or edit this field.

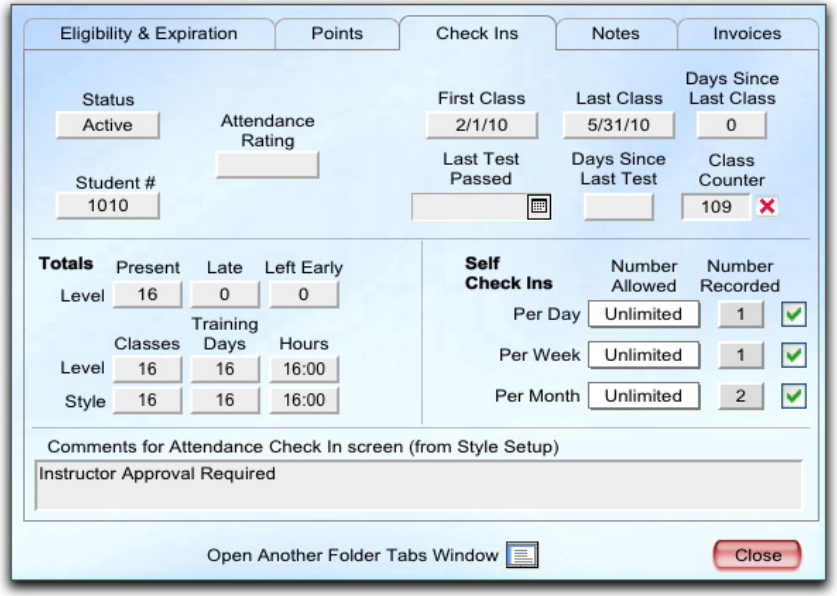
Limiting Check Ins per Day, Week or Month
You can limit the number of times a student checks into a class using this style of instruction. You can control the number of self check ins for each day, week and month.

The default number of times a student can check themselves into a class in each style of instruction is set on the Style Preferences folder tab of the Style & Rank screen. The settings you choose here are automatically entered when a student is enrolled into this style of instruction, but can be changed for each individual student. If you alter the Self Check In fields for an individual student those change will always override the default settings for the style.

Here's an example: Bill Smith is enrolled in Hapkido, and the default check in number is 1, but Bill's Check ins per Day field on his Style Details screen is set to 3, Bill will be allowed to check into 3 Hapkido classes.

Students enrolled in more than one style can check in according to the settings for each style. For example, if Jane Miller is enrolled in both Hapkido and Kung Fu, and the default Self Check Ins per Day is 1 for Hapkido and 2 for Kung Fu, Jane could check into 3 classes in one day: 1 Hapkido plus 2 Kung Fu classes.

the Check Ins Folder Tab



Take a look at the Self Check In fields. Just to the right are green Replace buttons. You'll find these Replace buttons on other screens as well.

Replace Buttons
To quickly change many records, use the Replace button. It's a green check mark. You'll find these buttons on a variety of screens. Click the Replace button beside a field to apply the current setting to all records in the found set. Search your records to create a found set or click the Show All button to modify all records. Changes made using the Replace button cannot be undone. Use the Replace buttons with caution. If in doubt, run the Backup Snapshot Wizard first.

Comments for Attendance Check In
You can also modify the comments assigned to each rank on the Styles & Ranks screen. Just edit the text at the bottom of Check Ins folder tab. Changes made here apply only to the current student.
To change the rank comments for all students, click the Edit button next to the Style Name to display the Styles & Ranks screen. Edit the comments then close the Styles & Ranks window. To apply the changed rank comments and refresh all of the current rank settings, single click the Reset button on the Eligibility & Expiration folder tab.

Class Counter & Open Another Folder Tabs Window

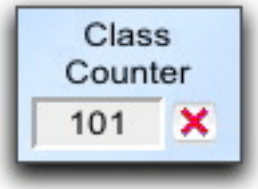
the Class Counter
The Class Counter is a custom field which is incremented each time a student attends a class.

This field can be used if you would like to record the number of classes attended since an event other than the last test date. It will simply count the number or classes attended regardless of rank.

For example, some schools use this field to record the number of classes since a seminar or banquet.

Click on the light purple field above of the Class Counter field to edit the label for this field.

Edit the white field to change the counter value.



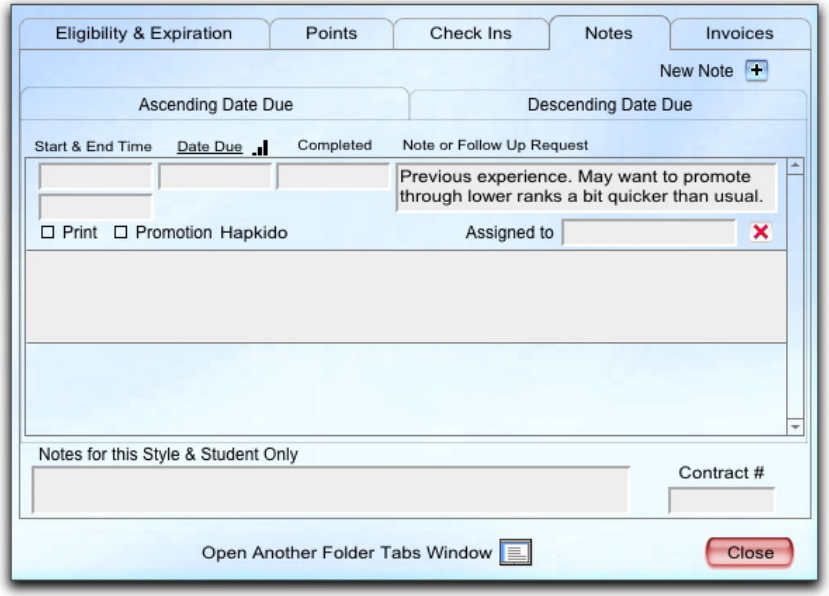
To clear the Class Counter field for a single student, click into the field and delete the number.

To reset the Class Counter for the found set click the red X.

Changing the level or rank displayed will have no affect on the Class Counter since this counter is independent of the students level or rank.

Open Another Folder Tabs Window
If you need to see information on two different folder tabs on the Style Details screen, click the Open Another Folder Tabs Window button. Then arrange the windows side by side. Click the Close button after you are done.

the Notes Folder Tab

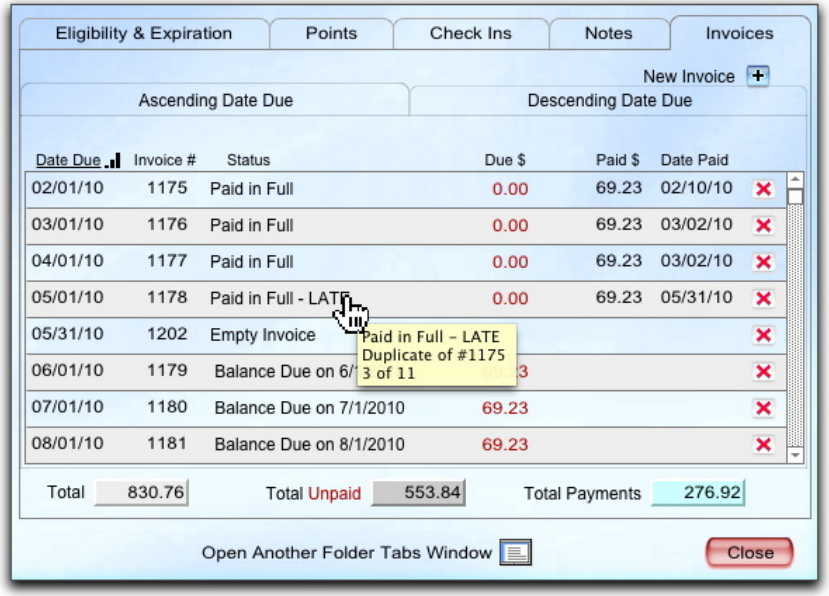


Create Notes and Followups
Click the New Note button to create a new Note or Follow Up for a student. Notes are covered in detail later in this tutorial.

Notes for This Style & Student Only
If you would like to record notes for the current student that pertain only to this particular style of instruction, use the Notes field at the bottom of the Notes folder tab on the Style Details screen. These notes will only appear in reports pertaining to this style.

Contract #
If you have a preprinted or association contract you can use the Contract # field on the Notes folder tab of the Style Details screen to record the Contract #. Otherwise, you can leave this field blank.

the Invoices Folder Tab



Invoices Folder Tab
You can view all of a students invoices from the Style Details screen. Just click the Invoices folder tab.

All invoices are displayed, even if they contain items not related to this style.

Change the Sort Order by clicking on the Date Due Sort button.

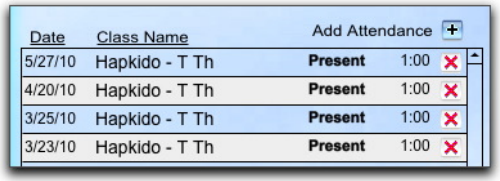
To get more information about an invoice, hold the mouse over the status or amount fields. A yellow sticky note will appear after a brief delay.

Click on an invoice to view it.

Click the New Invoice button to create a new invoice for this student.

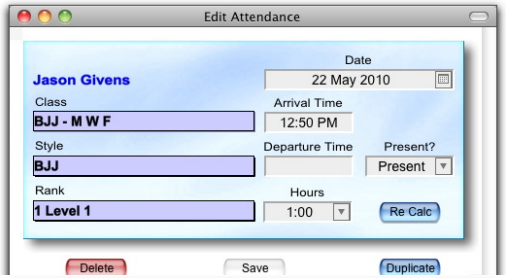
Attendance Recording from the Style Details Screen

If you would like to record attendance for a student after they have attended a class, this can be done on the Style Details screen. To view the Style Details screen go to the Styles, Classes & Attendance screen of the student you wish to record attendance for, then click directly on the desired style of instruction from the list in the top left corner of the screen. This will open the Style Details screen.


Date
Class Name
Add Attendance
5/27/10 Hapkido - T Th Present 1:00
4/20/10 Hapkido - T Th Present 1:00
3/25/10 Hapkido - T Th Present 1:00
3/23/10 Hapkido - T Th Present 1:00

To add an attendance record click the Add Attendance + button above the list of attendance entries.

A dialog box will appear. Click directly on a class name from the pick list of available classes for this style. An attendance record will be create. You can now modify the fields as needed. Click Save to record the attendance entry.



Once you've recorded some attendance, only the attendance dates for the Rank Displayed will be shown. To view previous ranks, select a lower rank from the Rank Displayed drop down menu in the bottom left corner then single click the Update button.

Also, you can use the attendance check list or attendance check in preference 2 to record attendance *after* a student has already attended a class.

There are many powerful Attendance recording features in the Studio Organizer. Be sure to read the *Attendance Recording* chapter in this manual for all the details.

Editing the Rank

When viewing the Style Details screen, the Rank field at the top of the screen is a drop down menu. So if you want to change the rank of student without using the Promotions Wizard, you can simply select the a different rank from the drop down menu.

This is very useful if you'd like to enter attendance data for previous ranks. Just don't forget to switch the rank back to what it's supposed to be when you're done.

Buttons on the Style Details Screen

Print Options on the Style Details screen
The Print button on the Style Details screen has a drop down menu with these options: Full Page, Detailed and Brief.

The Full Page report is a single page printout of most of the details displayed on the Style Details screen. Print this report if you'd like to have a hard copy of this information. The Detailed and Brief reports display similar information, but include many students per page. Click the Preview button to see how each report will print.

Find Options on the Style Details screen
The Find button on the Style Details screen has a drop down menu with several options.

Select **Records** and single click the Find button to enter find mode. Enter your find criteria. Single click the Find button again to search your records.
Select **Absentees** and click the Find button to display all students who are have been absent for the number of days entered at the bottom of the Defaults folder tab of the Preferences screen.
Select **Eligible** and click the Find button to display all students who are almost eligible or eligible for testing or promotion.
Select **Expiring** and click the Find button to display all students who are almost expired or have expired.

the View Button
To view the student's information in a new window, click the View button to the right of the student's name at the top of the screen.

If you have created a found set, you can view the Student Info screen of all the records in the found set. This is useful for creating reports, letters or emails using the found set.

To close the new window created, hold the SHIFT key and click on the Main Menu button on the left side of the screen.

the Greeting Button
If you would like to edit or preview a students' attendance greeting click the Greeting button at the top of the screen. Changes made to the design of the screen will be applied to all students.

Click the Preview button to see how the attendance greeting screen will appear.

the Style Details Screen

That covers the Style Details screen. Click the Close button to return to the Styles, Classes & Attendance screen.

After you've entered one or more style of instruction on the Styles, Classes & Attendance screen, you can quickly view the Style Details screen which displays attendance totals, next test eligibility, contract #, expiration date and more.

To view the Style Details screen, first find the student you wish to view, then click on Styles, Classes & Attendance in the column on the left. Next, you'll see a list of all the styles this student is enrolled in the top left corner of the screen under the heading Style of Instruction & Rank. To view the Style Details screen, single click directly on a style name. This will open a new window which displays the Style Details screen.

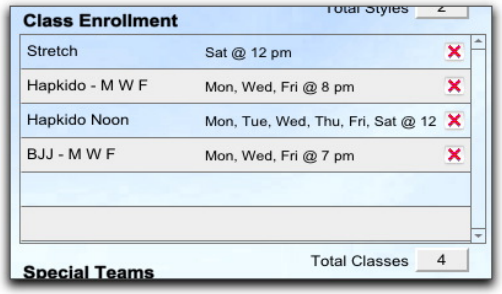
Click the Close button when you're done viewing the Style Details screen.

To PERMANENTLY delete a style of instruction, go to the Styles, Classes & Attendance screen and click the red X to the right of the style name. WARNING: Record deletion cannot be undone.

Now that the style and rank have been selected, let's enroll the student in some classes...

Class Enrollment

In order to enroll a student in classes, you must first enter your classes on the School Info screen. Entering your class schedule is explained in detail the *School Setup* tutorial. Please complete the *School Setup* tutorial before proceeding.

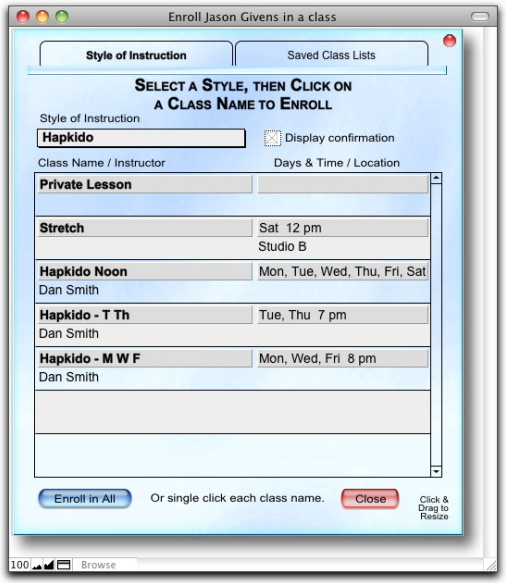


To enroll a student in a class, set the drop down menu below the New button in the top left corner to Class, then click the New button. (You can also click directly on the Class Enrollment text.) Select a style from the drop down menu, then single click directly on a class name in the list to enroll this student in that class. You can single click as many classes as you like to quickly enroll a student in more than one class.

Check the *Display Confirmation* check box if you'd like to see a brief message confirming enrollment, but leave this box unchecked for faster enrolling.

You can change the style of instruction drop down menu to select classes in a different style of instruction. There is no limit to the number of classes you can enroll a student into.

To enroll a student in *all* classes displayed, click the Enroll in All button at the bottom of the screen. To enroll a student in all classes from a saved class list, click on the Saved Class Lists folder tab then click directly on a list name. Click the Enroll in All button at the bottom of the screen to enroll this student in all saved class lists displayed on the screen. Click the Close button when you are done selecting classes.

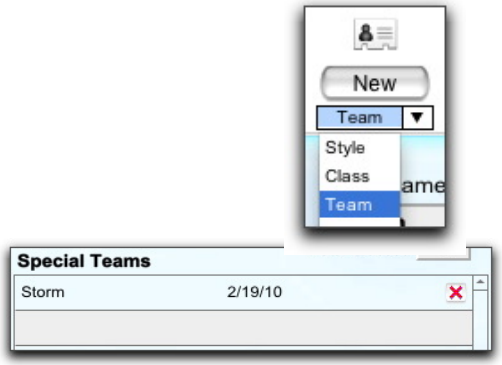


Once a student has been enrolled in a class, to view information about that class you can single click on the class name from the Class Enrollment list in the middle of the Styles, Classes & Attendance screen. This takes you directly the Class Entry screen. Any changes made here will affect all students enrolled in this class.

To remove a student from a class, click the red X to the right of the class name. This will unenroll the student from this class. The class information is not deleted.

If you would like to be warned if a student does not have a status of Active before enrolling in a class or style, check the *Show warning if not Active when enrolling in Style or Classes* check box on the Check In Options folder tab on the right side of the Styles, Classes & Attendance screen.

Special Teams, Last Class Attended & More



Special Teams
In order to select a special team, you must first enter your teams on the School Info screen as explained in the *School Setup* tutorial. Please complete the *School Setup* tutorial before proceeding.

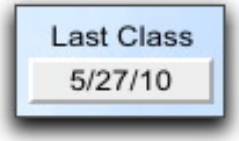
To enroll a student in a special team, set the drop down menu below the New button in the top left corner to Team, then click the New button. (You can also click directly on the Special Teams text.) Single click directly on a team name. A special team entry dialog will appear. All fields are optional. Click the Save & Add Another button or hit the ENTER key on your number pad to create add additional special teams.

There is no limit to the number of teams a student can be enrolled in.

To view special team information, single click on the team name in the list at the bottom left of the Styles, Classes & Attendance screen.

To remove a student from a team, click the red X to the right of the team name. This unenrolls the student from the team. It does not delete the team.

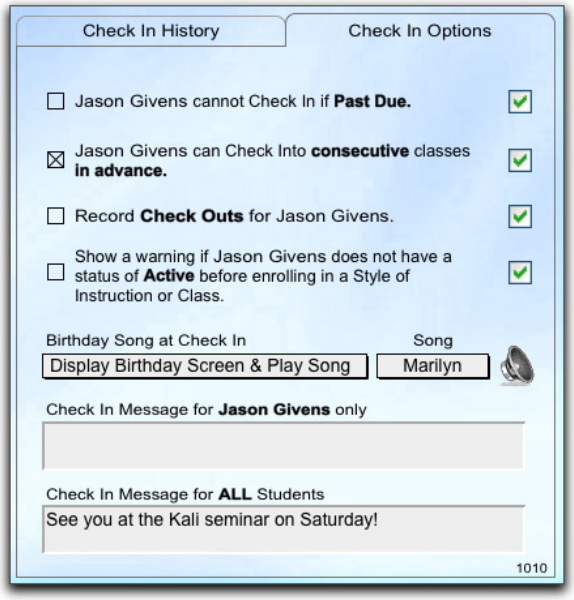
Last Class Attended
The Last Class Attended field in the upper left hand corner of the Styles, Classes & Attendance screen is based on all attendance in all styles a student might be attending. It displays the very last class attended by this student, regardless of the style of instruction.



Days Since Last Class
The Days Since Last Class field is based on attendance recorded for all styles a student might be attending. It takes today's date and counts backwards to the very last class attended regardless of style.

Check In History
On the left side of the Styles, Classes & Attendance screen there are two folder tabs. The Check In History folder tab displays all recorded attendance for this student. All Styles are displayed and totals appear at the bottom.

the Check In Options Folder Tab


Check In History
Check In Options
Jason Givens cannot Check In if Past Due.
Jason Givens can Check Into consecutive classes in advance.
Record Check Outs for Jason Givens.
Show a warning if Jason Givens does not have a status of Active before enrolling in a Style of Instruction or Class.
Birthday Song at Check In
Song
Display Birthday Screen & Play Song
Marilyn
Check In Message for Jason Givens only
Check In Message for ALL Students
See you at the Kali seminar on Saturday!
1010

Past Due Student Cannot Check In

If you wish to prevent a student with past due invoices from checking into a class, go to the Check In Options folder tab of the Styles, Classes & Attendance screen and check the *<Student Name> cannot Check In if Past Due* check box. This check box is also displayed on the Invoices & Tuition screen.

If this box is checked and the student is past due on any invoice, an *Access Denied* message will be displayed when the student checks in. You can control how the software responds when a student is denied access. Go to the Preferences screen and click on the Attendance Check In folder tab. There are powerful options such as *Do/Do Not Halt Check In, Do/Do Not Require Password* and *Do/Do Not Record Attendance.*

Advance Check In

Students enrolled in two or more classes that meet on the same day can check themselves into their classes at the *beginning* of the first class. So if your student is enrolled in Hapkido at 7 p.m. and BJJ at 8 p.m. she can scan her card once to check into Hapkido, then she'll be asked if she wants to also check into BJJ at 8 p.m. If she scans her card again, she's checked into BJJ with an arrival time of 8 p.m. If she doesn't scan her card again, the next student simply scans their card to reject the BJJ check in and normal attendance check in scanning resumes. You can also hit the ENTER key on the keyboard to resume normal scanning. In order to allow a student to use this feature, go to the students Styles, Classes & Attendance screen, select the Check In Options folder tab and check the *<Student Name> can Check Into consecutive classes in Advance* box.

the Check In Options Folder Tab

Keep in mind you don't have to individually check these boxes being described here. To quickly change many records, use the Replace button. It's a green check mark. You'll find these buttons on a variety of screens. Click the Replace button beside a field to apply the current setting to all records in the found set. Search your records to create a found set or click the Show All button to modify all records. Changes made using the Replace button cannot be undone. Use the Replace buttons with caution. If in doubt, run the Backup Snapshot Wizard first.

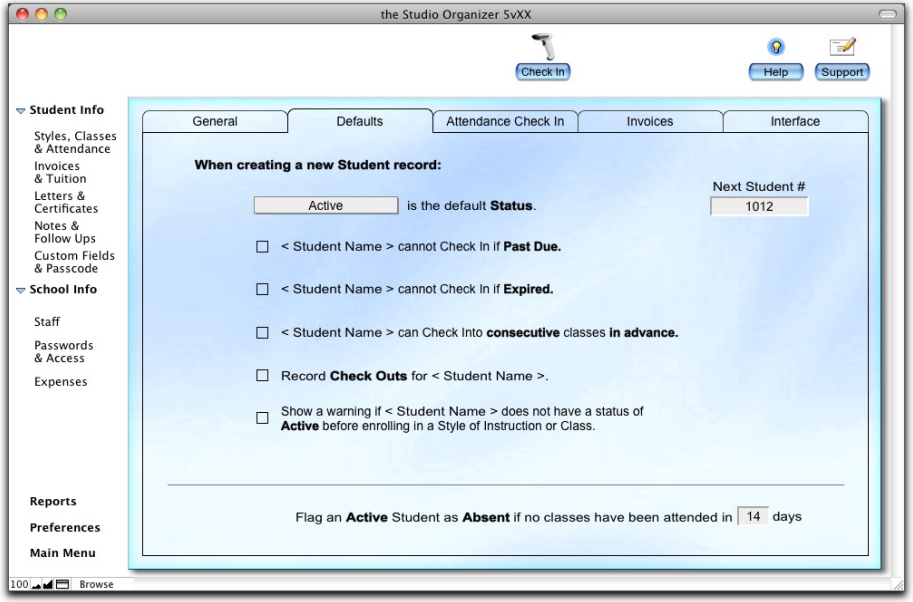
Checking Out
To allow a student to check out after a class ends go to the Check In Options folder tab on the students Styles, Classes & Attendance screen and check the *Record Check Outs* box. Now when a student scans their card a second time on the same day the software will look for the students first check in record for today and enter the departure time into that record. A brief *Check Out Recorded* message will display. Once a student has checked out that record is flagged in light blue on the Styles, Classes & Attendance screen, but only if the Record Check Outs option is checked.

A student can check in and out of one class, then later in the day check into and out of a second class. If a student has checked in several times using the Advance Check In feature, when the student scans their ID card to check out, the class with the *latest* starting time will be selected and the check out time will be recorded into this record.

Show Warning if Not Active
If you would like to be warned if a student does not have a status of Active before enrolling in a class or style, check the *Show warning if not Active when enrolling in Style or Classes* check box on the Check In Options folder tab on the right side of the Styles, Classes & Attendance screen.

Display Check In Message for <Student Name> only
If there's a special message you would like to display on a students' attendance greeting screen, enter your message into the *Check In Message for <Student Name> only* field at the bottom of the Check In Options folder tab on the Styles, Classes & Attendance screen. When this student checks into any class in any style, this message is included in the attendance greeting screen. The message is displayed every time this student checks in, or until you delete the text from this field.

Preferences - Defaults



Let's just to the Preferences screen for just a moment...
Click the Preferences button to see the defaults used on the Check In Options folder tab of the Attendance screen.

The check boxes on the Defaults folder tab mirror those found on the Check In Options folder tab of the Styles, Classes & Attendance screen.

The Next Student # field allows you to create your own student #'s. Enter any number you wish and that number will automatically be incremented by one. Only numbers can be used.

These defaults are not applied to existing records, only new student records created using the New or Duplicate buttons on the Student Info screen.

Absentee Preference
It's easy to flag absent students. Just go to the Defaults folder tab of the Preferences screen and enter a number in the *Flag An Active Student As Absent If Student Has Not Attended A Class For X Days* field. If you enter `14`, any active student who has not attended a class in 14 days will have the word *Absent* appear under their photo on the Student Info screen.
Now let's return to the Attendance screen.

the Birthday Songs

There are 10 birthday songs to choose from. Select the default song on the Attendance Check In folder tab on the Preferences screen. Every new student record created will have that song selected, but you can change the birthday song for each student at any time.

You can select unique birthday song settings for each student. Go to the Check In Options folder tab on the Styles, Classes & Attendance screen. Your options are:

Display Birthday Screen Only
Display Birthday Screen & Play Song
Ignore Birthday

There is also a drop down list of songs. Select a song from the list, then click the speaker button to listen to the song. Click the speaker button a second time to stop the song.

Birthday songs will be played the day before, the day of, or the day after a students birthday. If a student won't be in class on one of those days and you want to be sure they hear their birthday song, feel free to change their birth date, then change it back.

If the birthday song has already been played and you do not wish it to repeat, select Ignore Birthday from the *Birthday Song at Check In* drop down menu.

In order to play the birthday songs QuickTime software must be installed on your computer. Select Download QuickTime from the Help menu, or visit www.quicktime.com to download and install the latest version of QuickTime. It's free.

The attendance greeting screen must be activated on the Attendance Check In folder tab on the Preferences screen in order for birthday songs to be played. Birthday songs are only played during attendance check in when using the keypad, bar code scanner, bar code card reader or touch screen monitor.

Many thanks to Silver Apple Media for the creating the birthday songs.

the Promote Button

The Promote button is located at the top of the Styles, Classes & Attendance screen. Below the button is a drop down menu with the options *Test List* or *Promote*.

Select *Test List* and when you click the Promote button a find screen appears allowing to specify which students you'd like to include in your report. For starters, set the status to Active. The Eligibility field should automatically be set to Both. Click Continue and a list of active student who are eligible or almost eligible to test will appear.

If you would like to print certificates before these students are tested click the Create Certificates button. This will create certificates for the rank the student is testing for. For example, if a student is currently a White Belt and is testing for his Yellow Belt, a Yellow Belt certificate will be created.

Select *Promote* from the drop down list and when you click the Promote button the find screen appears. Set the status to Active and leave the Eligibility field set to Both then click Continue. A list of active students who are eligible or almost eligible to test will appear on the Promotions Wizard screen.

Check the box next to each student you wish to promote. Click Check All to select all students listed, or Uncheck All to unselect all students listed. If the majority of students are being promoted, click the Check All button, then uncheck those students who will not be promoted.

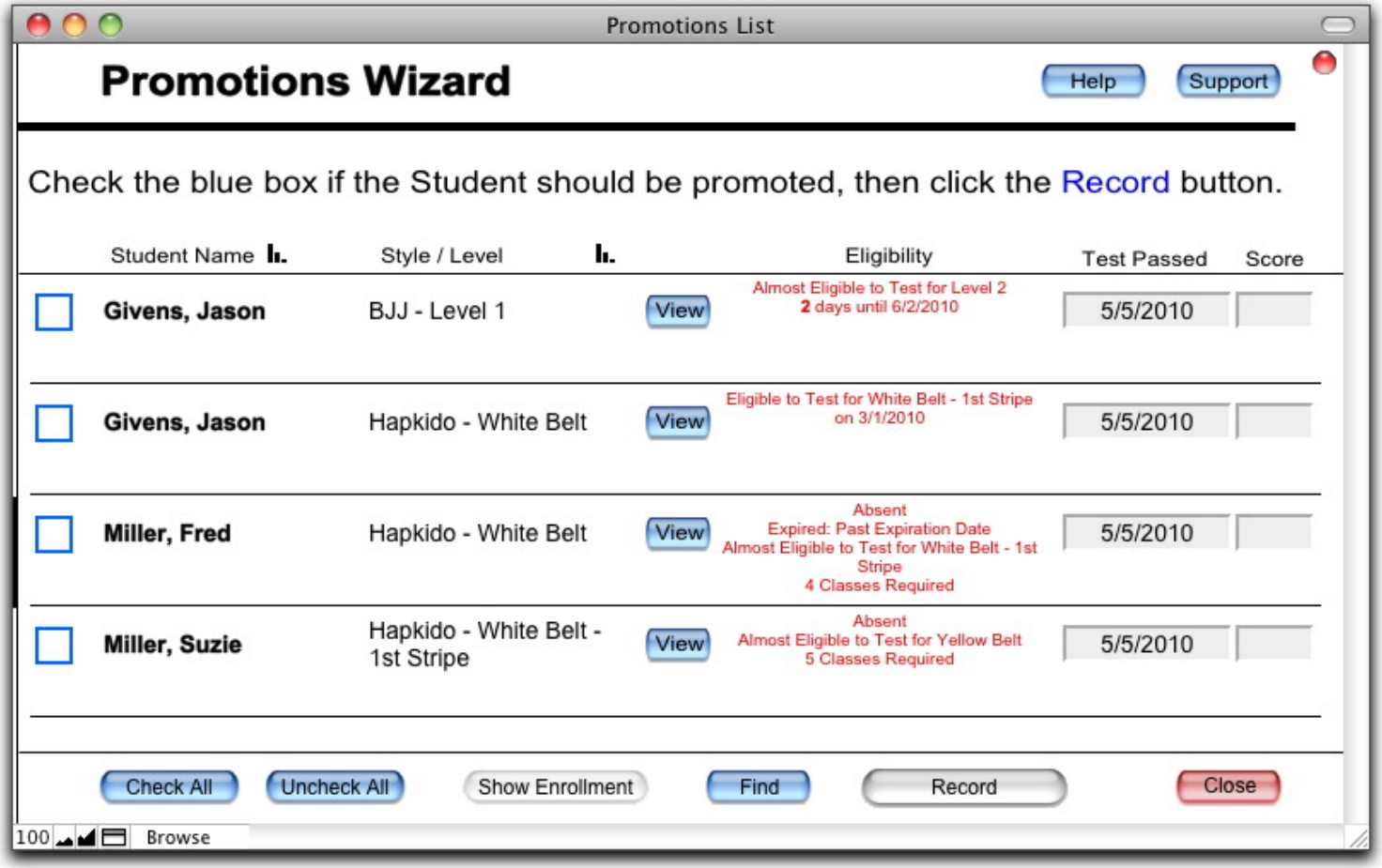
You can also add a Score or grade if so desired.

If you would like to add or remove classes these students are enrolled in, click the Show Enrollment button. Here you can edit the enrolled classes of the listed students.

Click the Record button when you are ready to record these promotions.

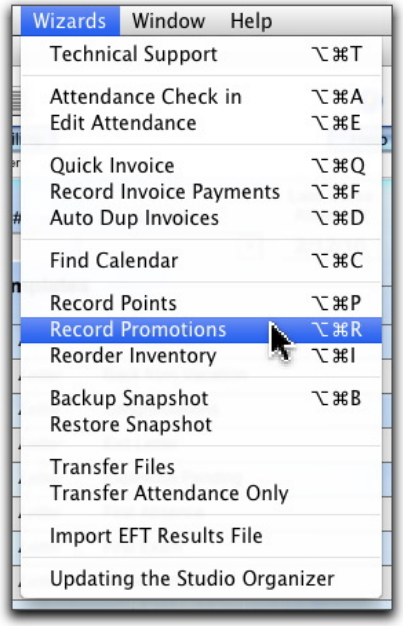
When you click the Record button, the Last Test Passed field on the Style Details screen is automatically updated, and notes are automatically created recording the promotion date and rank.

You will also be asked if you'd like to create certificates and update the Class Counter field. These are optional.



the Promotions Wizard

Changing a Test or Promotion List



The Promotions Wizard
You can also promote students by going to the Wizards menu and selecting Record Promotions. This does the same thing as using the Promote button. Take a look at the Wizards menu now to see some of the helpful functions Wizards will perform for you.

Adding to a Test or Promotion List
When you click the Promote button or create a test list or use the Record Promotions Wizard, only student who are eligible or almost eligible are displayed.

If you know a student who should be appearing in the test list or record promotions list, you can add them by clicking the Find button at the bottom of the screen.

Enter the students name and click the Find button again to search your records.

Select the student you wish to add and click the View button. This opens the Style Details screen for this student.

Now change the Eligibility Override field on the Eligibility & Expiration folder tab to *Ready to Test* and close the Style Details screen. Close the record promotions or test list screen and run the test list or Record Promotions wizard again.

Removing from a Test or Promotion List
When you create a test list or use the Record Promotions Wizard, only students who are eligible or almost eligible are displayed. If a student appears in the list whom you wish to exclude click on the View button. This opens the Style Details screen for this student.

Now change the Eligibility Override field to *Do NOT Test - Exclude* and close the Style Details screen. Close the list or screen then run the test list or Record Promotions wizard again.

After a Promotion & the Check In Button

After a Promotion

After you've completed a promotion and wish to update the Next Text Date or other requirements for an entire rank or level, go to the School Setup screen, click on the Style, then change the Next Test Date or other requirements. If all ranks use the same Next Test Date or Requirements use the Replace buttons (green check marks) to quickly change all ranks or levels.

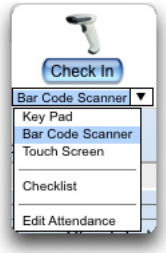
After you've made these changes, if you wish to apply those changes to a particular student, go to the Eligibility and Expiration folder tab of the Style Details screen and click the Reset button, then click on the Students name.

You can also perform a Find for a group of students on the Style Details screen, then click the Reset button, and click Found Set. To change all records, click the Show All button, then click the Reset button, then Found Set. This Reset feature is designed so you have control over which records are updated. Some schools do not wish to have every student updated, so it's not done automatically.

Also, the Next Test Eligibility fields can be changed individually on the on the Eligibility and Expiration folder tab of the Style Details screen. If this is the case, do not use the Reset button.

Check In Button

The Check In button on the Styles, Classes & Attendance screen is one way to record attendance. The drop down menu below the Check In button allows you select the key pad, a bar code scanner or touch screen monitor as your input device.



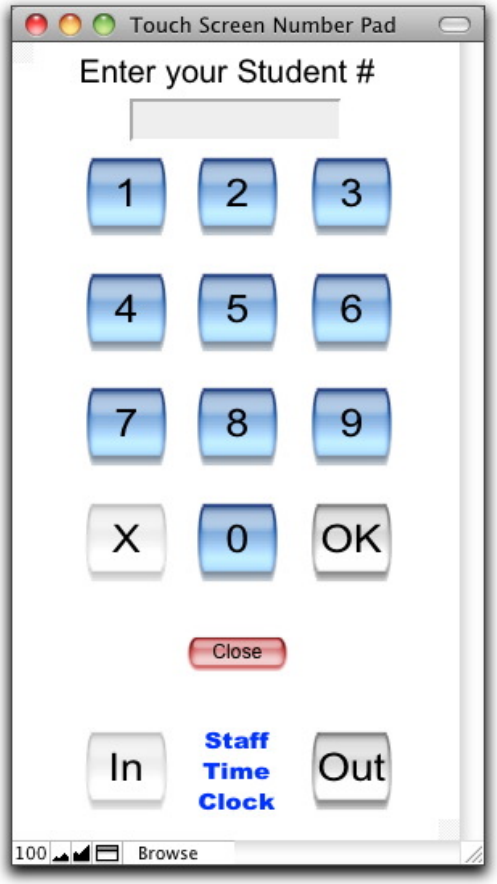
You can also record attendance manually using a checklist or you can edit attendance quickly and easily by selecting Edit Attendance from the drop down menu below the Check In button, or from the Wizards menu.

Once you have made a selection from the drop down menu, you can begin attendance recording by selecting Attendance Check In from the Wizards menu, or clicking the Check In button on the Main Menu.

Here's a helpful tip: There are keyboard shortcuts for Attendance Check In and Edit Attendance. Just click on the Wizards menu to review the keyboard shortcuts that are available. They're listed to the right of each command.

So if you need to quickly jump to attendance check in mode, fire off the keyboard shortcut. Let you students check in and when you exit attendance recording mode you'll be returned the screen you were previously viewing.
The attendance recording features of the Studio Organizer are very powerful. Let's explore them in detail...

Attendance Recording



Bar Code Scanner Setup

The Studio Organizer is bar code scanner compatible. Using a bar code scanner to record attendance is a tremendous time saver and well worth the investment.

When using a bar code scanner, always plug your bar code scanner directly into a USB port on your computer or a powered USB hub. Bar code scanners draw power from their USB connection, so do not plug a bar code scanner into a USB port on a keyboard or an unpowered USB hub. Once your scanner is connected, allow your computer to recognize the scanner. A wizard may appear guiding you through this process.

If you are using a Unitech MS210 bar code scanner on a Windows computer, no additional programming is required.

If you are using a Unitech MS210 bar code scanner with a Macintosh computer, it may be necessary to program your scanner. Scan the Factory Defaults bar code on Page A-2 in the back of the MS210 manual, then scan the USB bar code, which is the fourth one down on page A-1.

If you are using a Unitech MS146 card reader, no programming is required.

If you have a Honeywell 3800 it must be programmed to work with the Studio Organizer. The programming instructions can be found in the *Bar Coding* folder inside the *Studio Organizer* folder on your hard drive. This special programming only needs to be done once.

Instructions for all of the above bar code scanners are inside the *Bar Coding* folder, inside the *Studio Organizer* folder on your hard drive and are also available on the Purchase page of the Studio Organizer web site.

Using Your Existing Scanner
If you already own a bar code scanner you'll more than likely be able to continue to use it with the Studio Organizer. For instructions please read *Programming Your Existing Scanner* in the built in Help.

Creating Your Own Bar Code Designs
Please read *Creating Your Own Bar Coded Items* in the built in Help.

Installing the Bar Code Font & the Bar Codes Sheet

Installing the Bar Code Font
The bar code font is included with the Studio Organizer and is automatically installed on Windows computers. If you have a Macintosh computer or need to manually install the font, please follow these instructions.

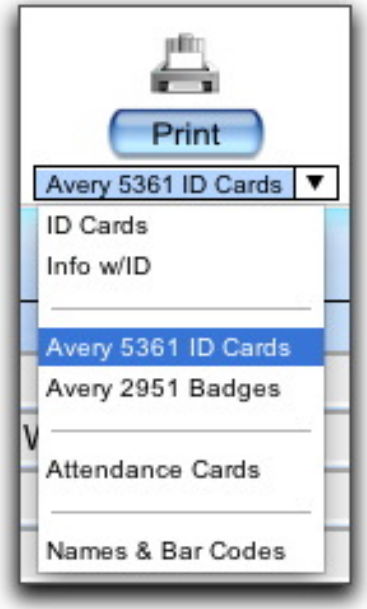
Windows Users
Quit the Studio Organizer.
Locate and open the *Studio Organizer* folder on your hard drive.
Locate and open the *Bar Coding* folder.
Select the Code 39 font file and select Copy from the Edit menu. (Do not select Cut.)
Open your Control Panels, then open the Fonts folder.
Select Paste from the Edit menu.
Restart your computer.

Macintosh Users
Quit the Studio Organizer.
Locate and open the *Studio Organizer* folder on your hard drive.
Locate and open the *Bar Coding* folder.
Select the Code 39 font file and select Copy from the Edit menu. (Do not select Cut.)
Open your hard drive, then open the Library folder.
Locate and open the Fonts folder.
Select Paste from the Edit menu.
Restart your computer.

the Bar Codes Sheet
Depending on how you choose to record attendance, you may want to print out the Bar Codes sheet and place it by the computer. This page contains the bar codes for numbers 1 through 10, as well as the bar codes for Clocking In Out.

To print the Bar Code sheet, go to the Reports screen, select Attendance from the list of report categories, then select the Bar Codes Sheet and click the Create It button.

Student ID Cards

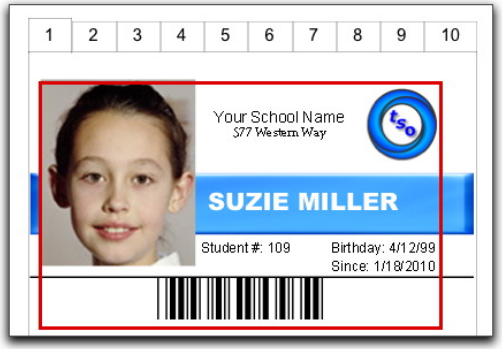


The Studio Organizer includes 10 Student ID card designs. If a student photo has not been inserted into the students record, the school logo will appear in place of the photo. To view the ID cards, go to the Student Info screen and click on the drop down menu below the Print button at the top of the screen.

Select **Avery 5361 ID Cards, Avery 2951 Badges** or **ID Cards** from the drop down menu then click the Print button. This will display the ID cards. Click on the numbered folder tabs at the top of the ID card to view the different designs.

The **Avery 5361 Self Laminating ID Cards** are special card stock that can be purchased from your local office supply store or online. They will work with both ink jet and laser printers, however with laser printers be sure the page is fed through the multipurpose tray and a heavy paper stock is selected in the print driver software. The 5361 uses a standard 8.5" x 11" page and prints three IDs per page. To laminate, simply remove the ID from the card stock and fold the laminate over the face of the card.

Select **ID Cards** if you'd like to print to blank paper. You don't need any special type of paper, however using 110 pound card stock is a nice touch. ID cards print 8 per page if you're using a horizontal design, and 6 per page if you're using a vertical design. Select an ID design you like then click the Print button. Use the hash marks and a paper cutter to separate the cards. You can laminate these ID cards using 3M Scotch Business Card / ID Protectors (LS851.)



The **Info with ID** prints on standard paper and is a full page print out of a students essential information and the page includes an ID card. You can clip the ID card from the page or leave it intact.

Avery 2951 Self Laminating ID Cards have been discontinued by the manufacturer but are still supported in the Studio Organizer.

After you have successfully printed your cards click the Close button to return to the Student Info screen. You will be prompted to clear the Print check box for these students. You can also click the red X under the Student Photo on the Student Info screen to clear all the Print check boxes.

Editing Information on Student ID Cards

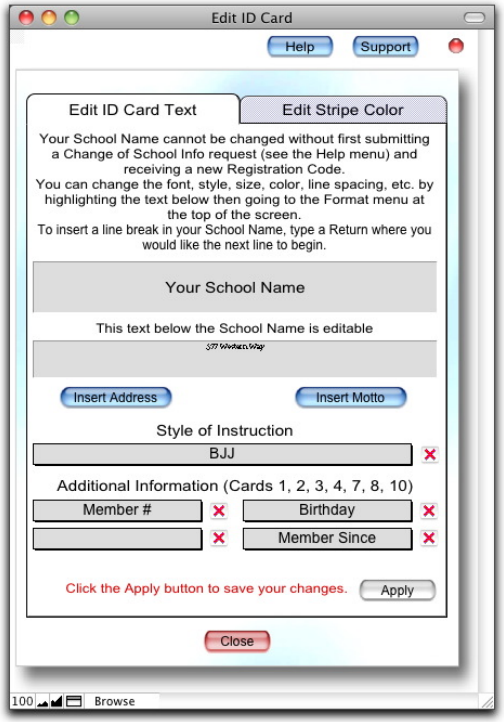
You can change the information displayed on the Student ID cards. To edit the ID card just click on the school address when viewing an ID card, or click the Edit ID Card button if you're viewing an Avery ID Card. If either the school name or address fields are incorrect or empty, click the Apply button to reset these fields to their defaults.

You can also change the font, style, size, color and line spacing of the school name by highlighting the text then going to the Format menu at the top of the screen and making selections from that menu. In order to see the changes you have made click the Apply button.

When it comes to font spacing, what you'll see on the screen will often be different than what actually comes out of your printer. If the spacing looks wrong on screen, print the ID card to see the actual results.

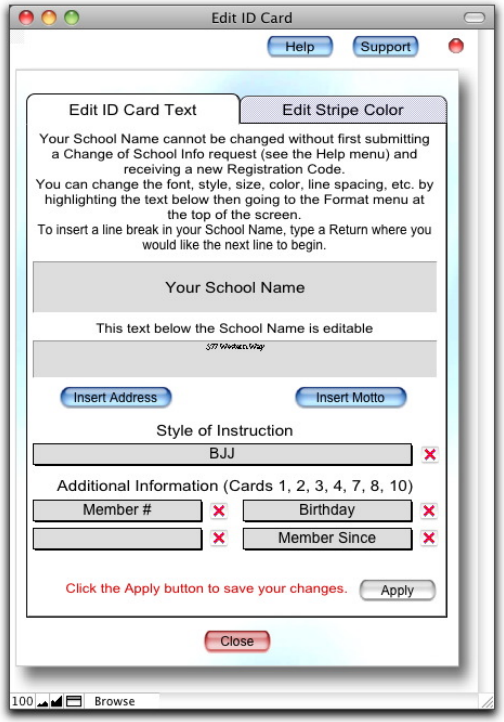
You can also change the line breaks in the school name. Just type a RETURN in the school name where you'd like a new line to begin. Do not attempt to change the school name. Changing your school name will require a new Registration Code.

The text field below the school name is customizable. Use the buttons to enter the school address or motto. You can also leave this field blank or enter anything you wish. You can change the font style, size, color and spacing of this text by highlighting the text then going to the Format menu at the top of the screen. In order to see the changes you have made single click the Apply button.


Edit ID Card
Help
Support
Edit ID Card Text
Edit Stripe Color
Your School Name cannot be changed without first submitting a Change of School Info request (see the Help menu) and receiving a new Registration Code.
You can change the font, style, size, color, line spacing, etc. by highlighting the text below then going to the Format menu at the top of the screen.
To insert a line break in your School Name, type a Return where you would like the next line to begin.
Your School Name
This text below the School Name is editable
Insert Address
Insert Motto
Style of Instruction
BJJ
Additional Information (Cards 1, 2, 3, 4, 7, 8, 10)
Member #
Birthday
Member Since
Click the Apply button to save your changes.
Apply
Close
100
Browse

Additional Information Fields

You can also select a style of instruction and insert data directly from a student's record using the merge field drop down menus on the Edit ID Card screen. This additional information appears on card designs 1, 2, 3, 4, 7, 8 and 10.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To insert a line break in your School Name, type a Return where you would like the next line to begin.
Your School Name
This text below the School Name is editable
Insert Address
Insert Motto
Style of Instruction
BJJ
Additional Information (Cards 1, 2, 3, 4, 7, 8, 10)
Member #
Birthday
Member Since
Click the Apply button to save your changes.
Apply
Close
100
Browse

Make a selection from a drop down menu, or select Other and type any text your wish.

When selecting Custom Text or Date fields, the text label above the custom field is included.

Text may overlap if a selection is too long.

You can leave the Additional Information fields blank if you wish.

To clear an Additional Information drop down menu, click the red X beside it.

The birthday will not be displayed if there is no data in the first Birthday field on the Student Info screen.

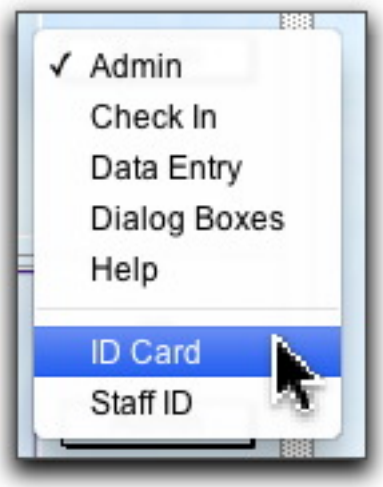
In order to use any of the Additional Information fields that display style information, a style of instruction must be selected in the field above.

When creating an ID card for just the current student, the first style of instruction the student is enrolled in is automatically selected.

Always click the Apply button to save your changes.

Changing the Color Used on the Student ID Card

To change the color used on the Student ID card click on the Edit ID Card button when viewing ID cards, then click the Edit Stripe Color folder tab. Single click on a color or background to apply it. Changes are applied immediately.

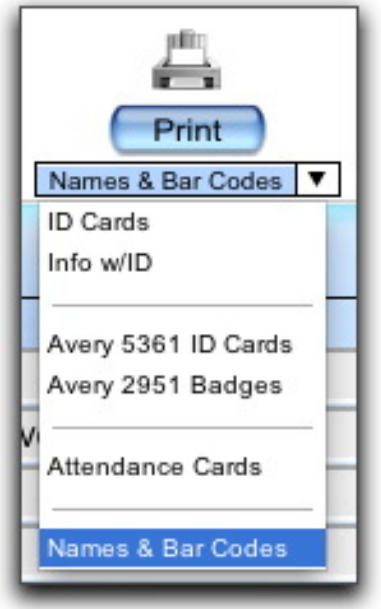


Or click on the Preferences button in the column on the left side of the screen, then click the Interface folder tab.

Scroll through the third column and locate a background color you like, then select Student ID from the drop down menu and single click directly on the color sample to apply the color.

A window will pop open and display a sample Student ID so you can verify your color selection then close after 4 seconds.

Printing Names & Bar Codes
Just below the Print button on the Student Info screen there is a drop down menu. Select Names & Bar Codes then click the Print button to print a list of student names with their Student # as a bar code. Keep this list by the attendance recording computer in case a student forgets their ID card.
Students can also check into class by typing their passcode, but they will need access to the keyboard to do so.

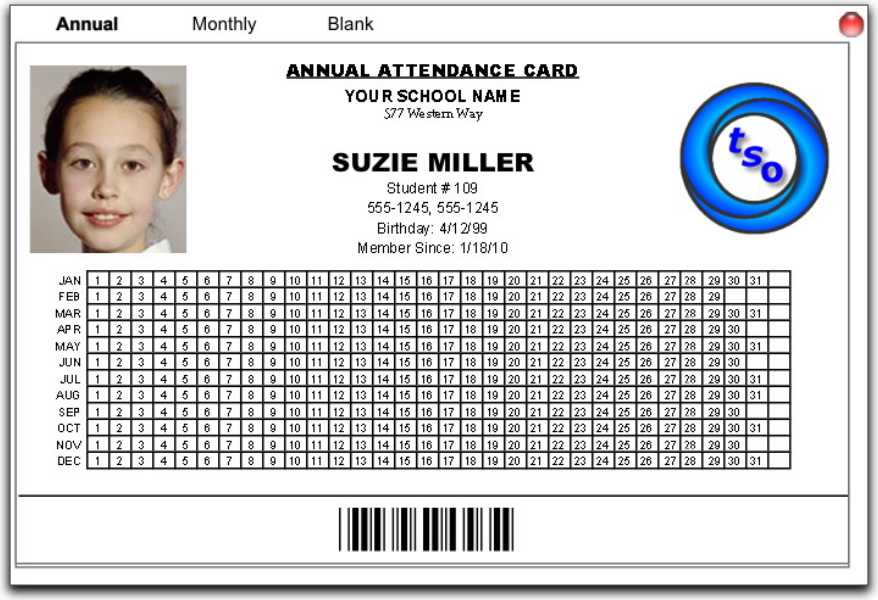


Pre Printed Key Tags & Plastic ID Cards
You can purchase inexpensive key tags or plastic ID cards that have your school logo and a preprinted bar code. Visit http://www.keytagworld.com.

Assign an ID card or key tag a student when they sign up. To enter the preprint bar code as the Student # go to the Student Info screen for the student and delete the automatically assigned Student # in the top right corner. With your cursor still in the Student # field, scan the bar coded item. The Student # field will now contain the bar coded number on the ID card or key tag.

You can use this trick with anything that has a bar code on it.

Attendance Cards



There are several different attendance cards for you to choose from. To view them, go to the Student Info screen and select Attendance Cards from the drop down menu below the Print button, which is located at the top, middle of the Student Info screen. Then click the Print button.

Now you'll see the first attendance card design. Click on the words Monthly or Blank to view the other designs. Select the card you like, then click the Print button.

None of your recorded attendance data is included on these cards. These are for manual attendance recording only.

You don't need any special type of paper to print attendance cards, but 110 pound card stock will make the cards more durable. Use a paper cutter to quickly separate the cards.

If a student photo has not been inserted, the school logo will appear in place of the photo.

After you have successfully printed these cards, click the Close button to return to the Student Info screen.
You will be prompted to clear the Print check box for these students.

You can also click the red X under the student photo field to clear all the Print check boxes.

the Birthday Songs

There are 10 birthday songs to choose from. Select the default song on the Attendance Check In folder tab on the Preferences screen. Every new student record created will have that song selected, but you can change the birthday song for each student at any time.

You can select unique birthday song settings for each student. Go to the Check In Options folder tab on the Styles, Classes & Attendance screen. Your options are:

Display Birthday Screen Only
Display Birthday Screen & Play Song
Ignore Birthday

There is also a drop down list of songs. Select a song from the list, then click the speaker button to listen to the song. Click the speaker button a second time to stop the song.

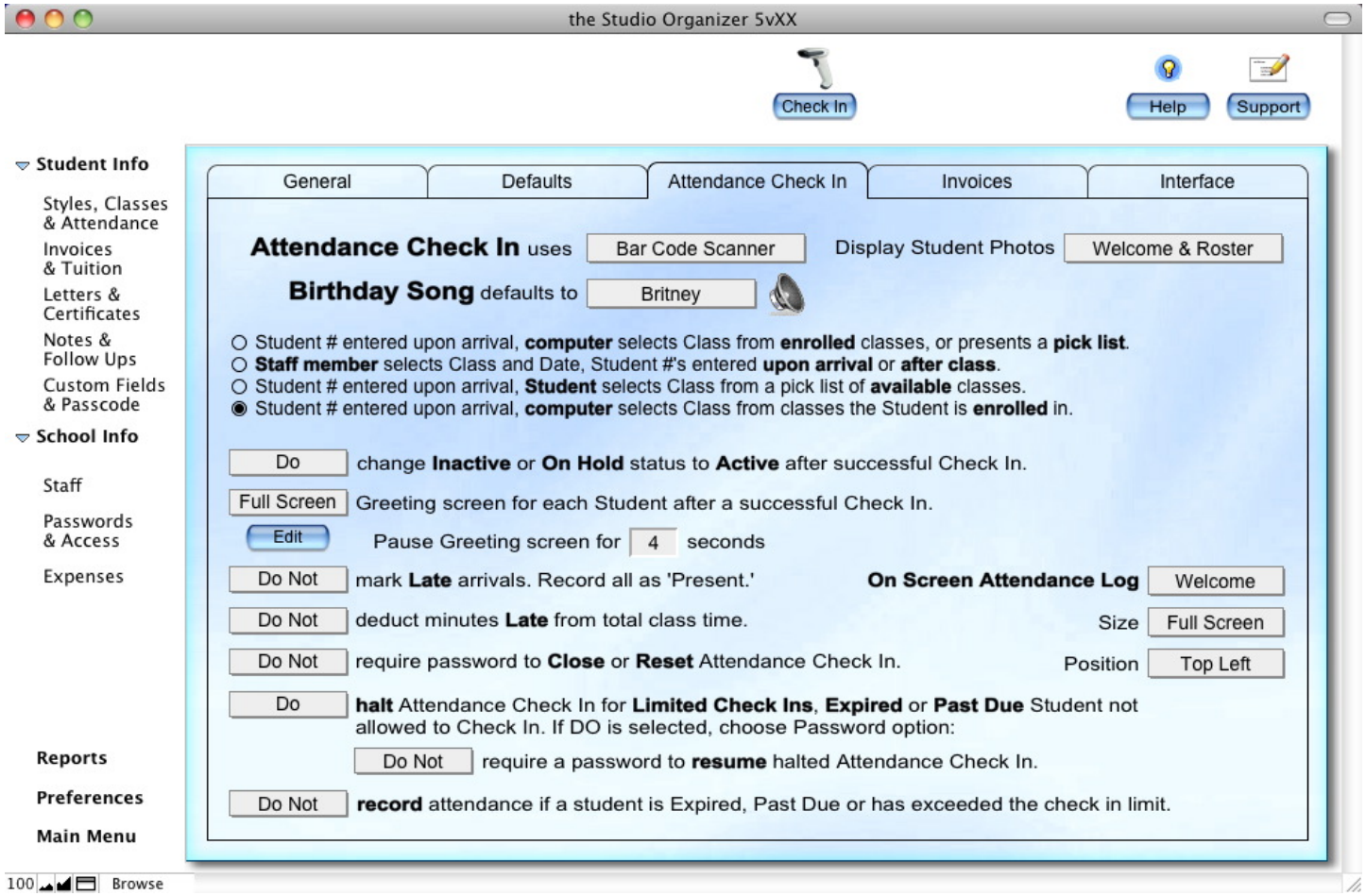
Birthday songs will be played the day before, the day of, or the day after a students birthday. If a student won't be in class on one of those days and you want to be sure they hear their birthday song, feel free to change their birth date, then change it back.

If the birthday song has already been played and you do not wish it to repeat, select Ignore Birthday from the *Birthday Song at Check In* drop down menu.

In order to play the birthday songs QuickTime software must be installed on your computer. Select Download QuickTime from the Help menu, or visit www.quicktime.com to download and install the latest version of QuickTime. It's free.

The attendance greeting screen must be activated on the Attendance Check In folder tab on the Preferences screen in order for birthday songs to be played. Birthday songs are only played during attendance check in when using the keypad, bar code scanner, bar code card reader or touch screen monitor.

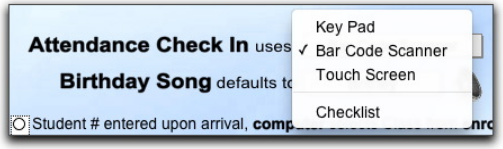
Many thanks to Silver Apple Media for the creating the birthday songs.


the Studio Organizer 5vXX
Check In
Help
Support
Student Info
Styles, Classes & Attendance
Invoices & Tuition
Letters & Certificates
Notes & Follow Ups
Custom Fields & Passcode
School Info
Staff
Passwords & Access
Expenses
Reports
Preferences
Main Menu
General
Defaults
Attendance Check In
Invoices
Interface
Attendance Check In uses
Bar Code Scanner
Display Student Photos
Welcome & Roster
Birthday Song defaults to
Britney
Student # entered upon arrival, computer selects Class from enrolled classes, or presents a pick list.
Staff member selects Class and Date, Student #'s entered upon arrival or after class.
Student # entered upon arrival, Student selects Class from a pick list of available classes.
Student # entered upon arrival, computer selects Class from classes the Student is enrolled in.
Do
change Inactive or On Hold status to Active after successful Check In.
Full Screen
Greeting screen for each Student after a successful Check In.
Edit
Pause Greeting screen for 4 seconds
Do Not
mark Late arrivals. Record all as 'Present.'
On Screen Attendance Log
Welcome
Do Not
deduct minutes Late from total class time.
Size
Full Screen
Do Not
require password to Close or Reset Attendance Check In.
Position
Top Left
Do
halt Attendance Check In for Limited Check Ins, Expired or Past Due Student not allowed to Check In. If DO is selected, choose Password option:
Do Not
require a password to resume halted Attendance Check In.
Do Not
record attendance if a student is Expired, Past Due or has exceeded the check in limit.
100
Browse

the Attendance Check In Preferences screen

Attendance Check In Preferences

Attendance Recording Hardware Preference
When it comes to recording attendance, everything starts at the Attendance Check In folder tab of the Preferences screen.

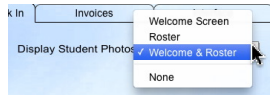


First, select the hardware you'll use: Bar Code Scanner, Touch Screen or Keypad.
(If you're using a bar code card reader, you'll select Bar Code Scanner.)

Each of the Check In options will be explained in detail in the following pages.

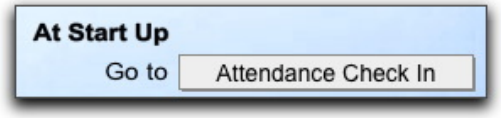
Remember all of this information is just a mouse click away. Click the Help button any time you need to refresh your memory.

Display Student Photos Preference
On the Attendance Check In folder tab of the Preferences screen use the Display Student Photos drop down menu to determine if student photos will be displayed on the Attendance Greeting screen. Student Photos can also included on these rosters: Class Roster and Attendance Sheet.



Begin Attendance Check in at start up
If you wish, the Studio Organizer can immediately begin attendance check in each time the software opens.

To do this, go to the Preferences screen and click on the General folder tab. Select Attendance Check In from the Go To drop down menu in the At Start Up section.



No Class Found Error Message
When recording attendance, be sure each student is enrolled in a style of instruction. Otherwise a *No Class Found* error message will appear even if the student is checking into a class they are not enrolled in.

Attendance Check In Option 1

On the Attendance Check In folder tab of the Preferences screen you can select how attendance will be recorded.

Option 1
In order for an attendance greeting screen to be displayed the student must be enrolled in the style of instruction of the class being attending. When check in option 1 is selected the student must also be *enrolled* in the class being attended.

Use Option 1 if students normally check themselves in and you've enrolled each student in the style of instruction and classes they can attend. This is done on the Styles, Classes & Attendance screen.

When a student scans their ID card or enters their passcode the computer selects the class to record based on enrolled classes or presents a pick list of all available classes if more than one class is available. The computer records the check in time and date.

How it Works
When a student arrives for class he enters his Student # and the computer searches for a matching class from the list of classes this student is enrolled in.

The student must check into the class within a half hour of the class start time.
For example: If a class starts at 7 p.m., students can check in as early as 6:30 p.m. (6:29 p.m. or before is too early.)
Students arriving late can check in as late as 7:30 p.m. (7:31 p.m. or after is too late.)

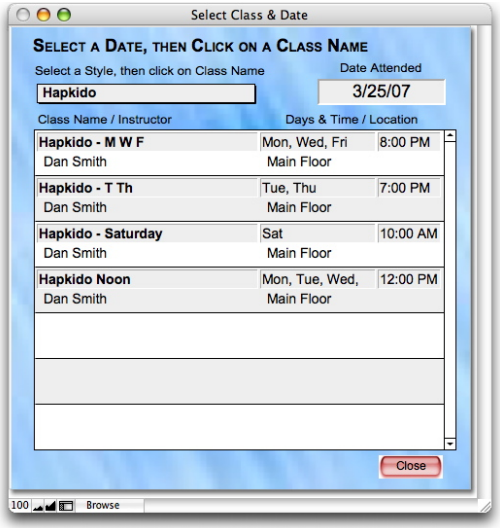
If one class is found, that class is automatically selected and current time and date are recorded.
If more than one enrolled class is found, the student will be prompted to pick a class from a list.

If no enrolled classes are found, a list of all available classes is displayed and the student will be prompted to pick a class from the pick list. The student may not be enrolled in classes presented in the pick list.
When viewing a pick list, classes are numbered and the student must select a number.
If using a keyboard, the student must type the number and hit the NUMBER PAD ENTER key.
If using a touch screen, the student simply touches in the number.
If using a mouse the student simply clicks on the number of the class.
If using a bar code scanner, a printout of bar coded numbers 1 thru 9 (the Bar Codes sheet) should be placed beside the computer so students can scan the correct number to select a class.

Attendance Check In Option 2

On the Attendance Check In folder tab on the Preferences screen you can select how attendance will be recorded.

Option 2
In order for a attendance greeting screen to be displayed, the student must be enrolled in the style of instruction of the class being attending. With this option, the student does not have to be enrolled in the class being attended.



Use Option 2 if students normally check themselves in, but a staff member preselects the class and date being attended

OR

If you would like to record attendance after a class has been completed.

A staff member selects the class and date.
The computer records the check in time.

How it Works
When attendance check in is started, a screen appears prompting the staff member to select a date and class.

The staff member can modify the date of the class and use the drop down menu to display different classes in different styles of instruction.

To select a class, single click directly on a class name.

All students that check in will be recorded as attending this class. The computer will record the check in time.

Attendance Check In Option 3

On the Attendance Check In folder tab on the Preferences screen, you can select how attendance will be recorded.

Option 3
In order for a attendance greeting screen to be displayed, the student must be enrolled in the style of instruction of the class being attending. With this option, the student does not have to be enrolled in the class being attended.

Use Option 3 if students normally check themselves in and you would like them to be able to pick from a list of all available classes. Class enrollment is not required.

The student selects a class from pick list.
The computer records the check in time and date.

How it Works
When a student arrives for class, they enter their Student # and the computer displays a list of available classes.

The student must check into the class within a half hour of the class start time.
For example: If a class starts at 7 p.m., students can check in as early as 6:30 p.m. (6:29 p.m. or before is too early.)
Students arriving late can check in as late as 7:30 p.m. (7:31 p.m. or after is too late.)

If no classes are available the time and date of attendance will be recorded, with *No Class Found* as the class name.

When viewing a pick list, classes are numbered and the student must select a number.
If using a keyboard, the student must type the number and hit the NUMBER PAD ENTER key.
If using a touch screen, the student simply touches in the number.
If using a mouse the student simply clicks on the number of the class.
If using a bar code scanner, a printout of bar coded numbers 1 thru 9 (the Bar Codes sheet) should be placed beside the computer so students can scan the correct number to select a class.

Attendance Check In Option 4

On the Attendance Check In folder tab on the Preferences screen you can select how attendance will be recorded.

Option 4 - No User Interaction Required
In order for a attendance greeting screen to be displayed, the student must be enrolled in one or more classes, as well as the style of instruction of the class(es) being attending. With this option, the student *must* be enrolled in the class(es) being attended, otherwise *No Class Found* is recorded.

Use Option 4 if students normally check themselves in and you've enrolled each student in the style and classes they attend. This is done on the Styles, Classes & Attendance screen. The computer will select the class to record, but this can be edited later if necessary.

The computer selects a class from the students enrolled classes and records the check in time and date.

How it Works

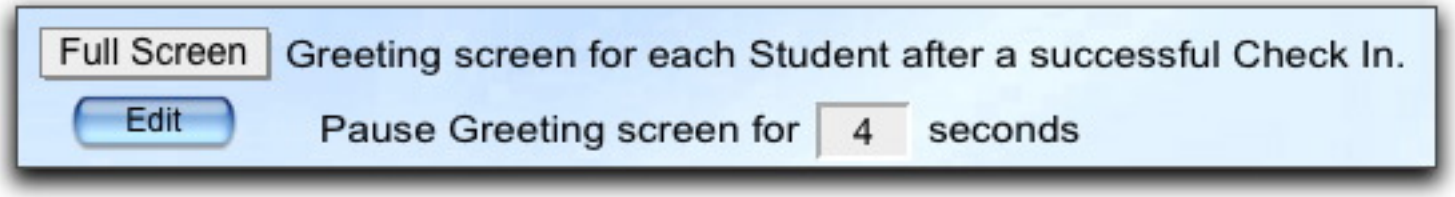
When a student arrives for class, they enter their Student # and the computer searches for a matching class from the list of classes this student is *enrolled* in, based on the day of the week. No user interaction is required with this option. The computer will always make a selection (which can be edited later) based on these criteria:

If **no** enrolled classes are found for this day of the week, the time and date are recorded, with *No Class Found* as the class name. Example: Janie Steven's checks in on Tuesday at 5 p.m. She is not enrolled in any classes that meet on Tuesday. *No Class Found* will be recorded with the current time and date.

If **one** enrolled class is found for this day of the week, that class is automatically selected regardless of the class start time and the current time and date are recorded. Example: Bill Smith checks on Thursday at 5 p.m. He is enrolled in one class that meets on Thursday at 6:45 p.m. Regardless of the current time, Bill will be checked into the 6:45 p.m. class with the current time and date. Even if he checks in at 7:00 p.m. he will be checked into the 6:45 p.m. class.

If **more than one** enrolled classes are found for this day of the week, the computer will select the class with a start time closest to the time of check in. The current time and date are recorded. Example: Fred Miller checks in on Tuesday at 6:50 p. m. He is enrolled in Tuesday classes that start at 6:30 and 7:00 p.m. Fred will be checked into the 7:00 p.m. class. Example: Jess Martin checks in on Monday at 5:05 p.m. He is enrolled in Monday classes that start at 4:45 and 5:00 p.m. Jess will be checked into the 5:00 p.m. class.

Displaying the Attendance Greeting



All of the remaining Preferences are explained in detail in the *Preferences* chapter, but here are some preferences you'll want to set right away...

To display the attendance greeting, go to the Preferences screen and click on the Attendance Check In folder tab. Make a selection from the drop down menu to the left of *Greeting screen for each student after a successful Check In.*

Full Screen will maximize the attendance greeting to fill the entire screen.

Show will display the attendance greeting in its own window.

Hide will not display the attendance greeting.

In the *Pause Greeting screen for X seconds* field enter the number of seconds you would like the message to be displayed.

Click the **Edit** button to customize your attendance greeting screen.

In order for a attendance greeting screen to be displayed, a student must be enrolled in the style of instruction of the class being attending. See the *Preferences* chapter for a complete details.

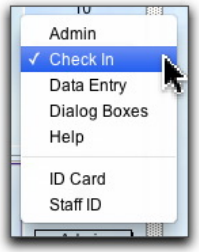
the Background Color of the Attendance Greeting

the Background Color of the Attendance Greeting

The attendance greeting screen can have it's own background color or pattern.

To change the color or background, click the Preferences button on the Main Menu, or in the column on the left side of the screen, then click on the Interface folder tab.

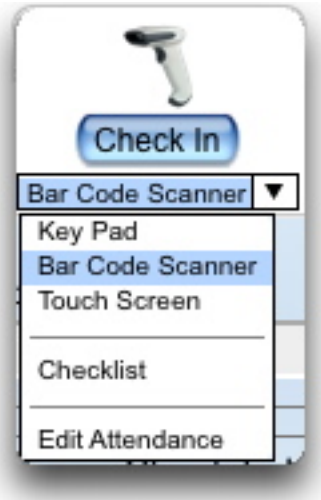
Scroll through the third column and locate a background color you like, then select Check In from the drop down menu.



Next, single click directly on the color sample to apply the color.

A window will briefly appear displaying the background selection.

Begin Recording Attendance



Before you can begin attendance recording, first make a selection from the drop down menu below the Check In button on the Styles, Classes & Attendance screen.

This drop down menu also appears on the Attendance Check In folder tab of the Preferences screen.

Once you've selected your attendance recording preferences, there are many ways to enter attendance recording mode.

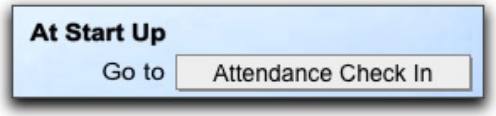
• Click the Check In button on the Main Menu.

• Click the Check In button on the Styles, Classes & Attendance screen.

• Select Attendance Check In from the Wizards menu.

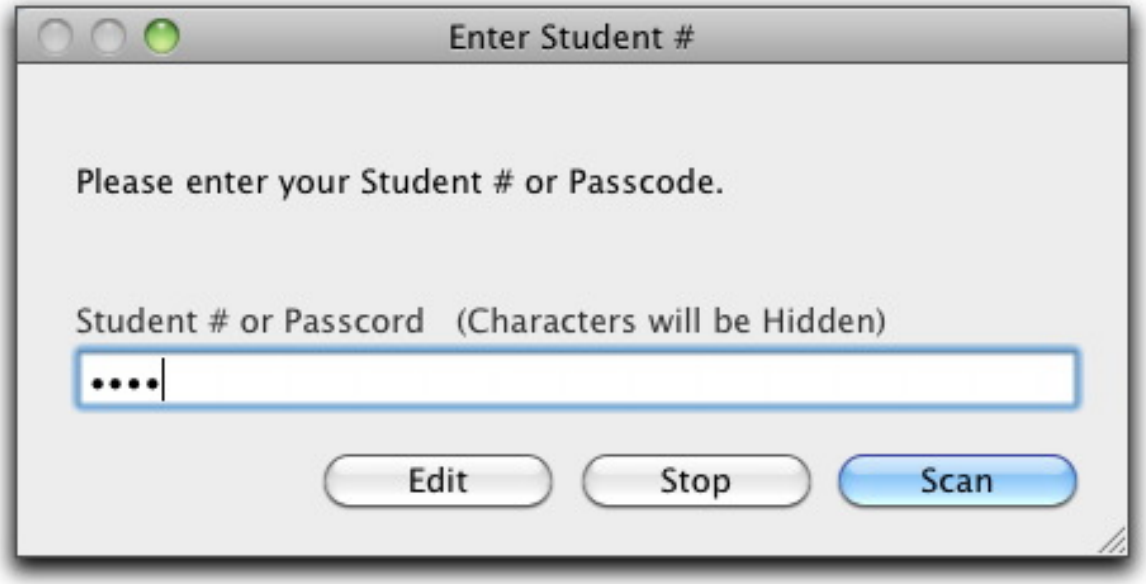
• Use the keyboard shortcut displayed in the Wizards menu:

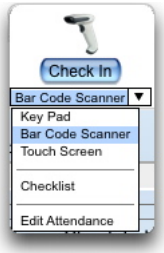
CONTROL + SHIFT + A (PC)
or
COMMAND + SHIFT + A (Mac) The Command key has propeller icon.



Begin Attendance Check In at Start Up
You can also set attendance recording to begin automatically when the Studio Organizer opens. Go to the Preferences screen, select the General folder tab and select *Attendance Check In* from the Go To drop down menu.

Bar Code Attendance Recording





To begin recording attendance using a bar code scanner, first be sure the drop down menu below the Check In button is set to Bar Code Scanner.

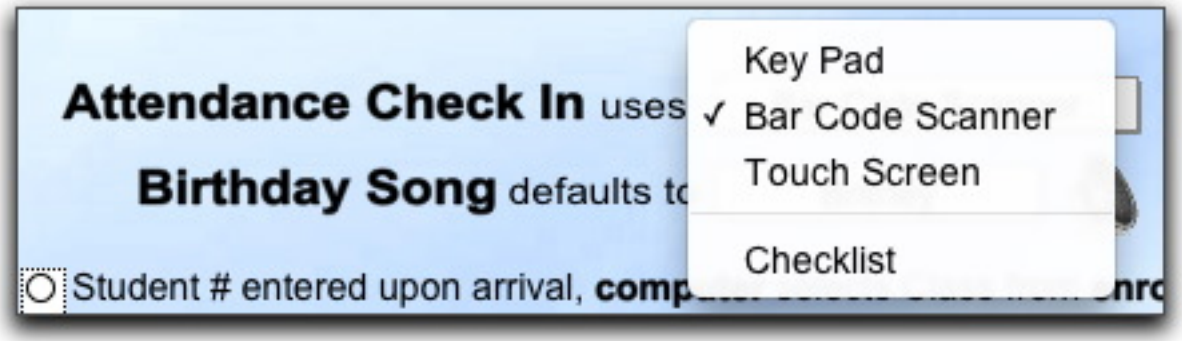
Click the Check In button on the Main Menu or Styles, Classes & Attendance screen to begin attendance recording. You can also begin scanning by clicking the Check In button on the Main Menu, selecting Attendance Check In from the Wizards menu, or firing the keyboard shortcut displayed in the Wizards menu.

Once you've started the check in process, the Enter Student # dialog box will wait for a bar code to be scanned. Scan a bar code and the Student # will be inserted into the field in the dialog box and the Scan button will automatically be clicked. If the Scan button is not automatically clicked after each scan your bar code scanner needs to be programmed to insert a carriage return as a terminator character. See the instructions that came with your scanner.

Attendance will be recorded for this student and the attendance greeting will display if enabled. The Enter Student # dialog box will return to wait for the next scan.

If you need to correct a check in record, click the Edit button to open the Edit Attendance Wizard.

Key Pad Attendance Recording



To record attendance using your keyboard, select Key Pad from the drop down menu below the Check In button on the Preferences or Styles, Classes & Attendance screen.

If you're using a keyboard which has separate number pad, you'll simply type in the Student # then hit the ENTER key on the number pad. Do not use the TAB, RETURN or ENTER key above the SHIFT key in the alphabet portion of the keyboard.
or
Type in the Student # or passcode then click the Scan button.
or
If you're using a small 18 key pad to record attendance, type in the Student #, then hit the ENTER key on the number pad.
or
If you're using a keyboard which does not have separate number pad keys, or a laptop computer, you'll type in the Student #, then turn NUM LOCK OFF and hit the ENTER key.

Touch Screen Attendance Recording

You don't have to purchase a touch screen to use this feature. Just place the monitor where it can be seen and the mouse within reach. Students can then use the mouse to click on the touch screen buttons.

The Studio Organizer.com does not sell or support touch screens, but you can use almost any touch screen currently available on the market today.

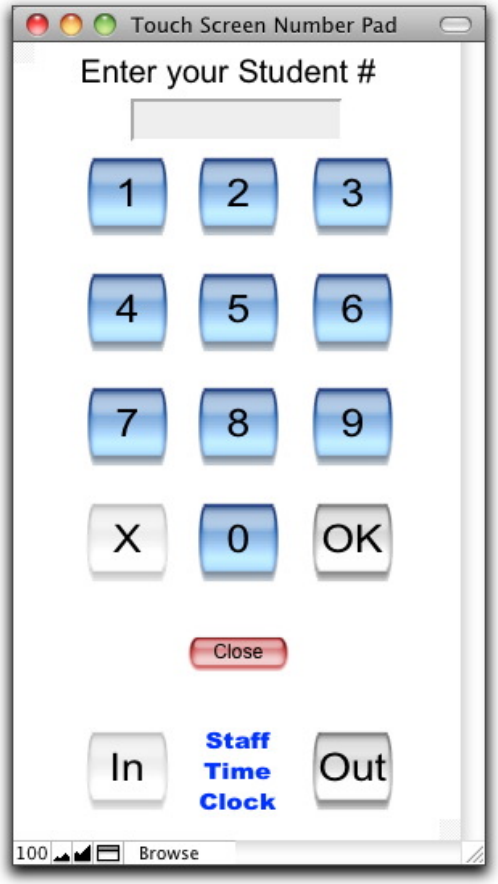
Touch screens do not require any special programming in order to work with the Studio Organizer.

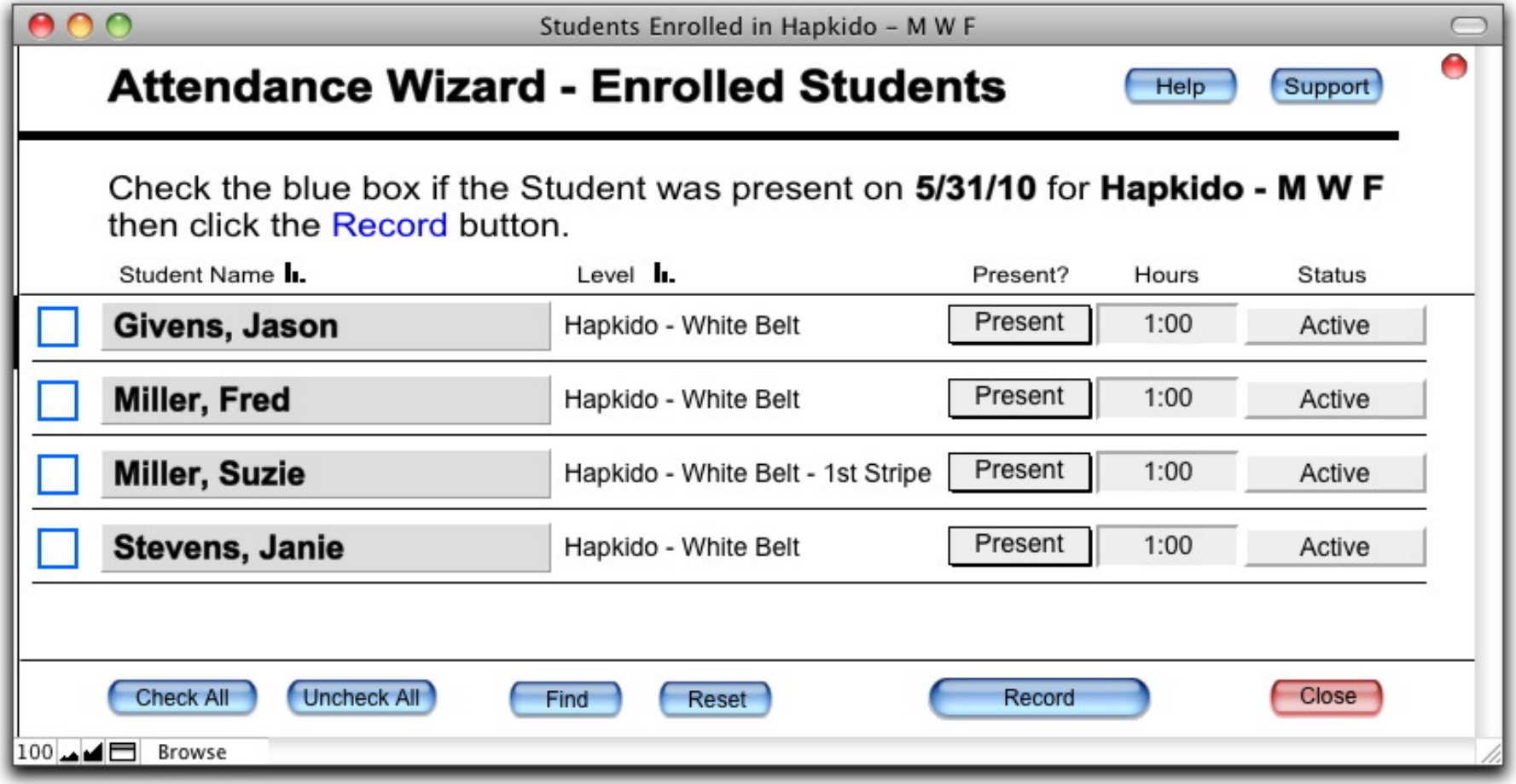
On the Attendance Check folder tab on the Preferences screen, or the drop down menu below the Check In button the Styles, Classes & Attendance screen, be sure to select Touch Screen as the hardware for attendance recording.

To record attendance, touch in the Student # then touch the OK button.

If you make a mistake, touch the X button to clear the Student #.

Touch the Close button to stop recording attendance.

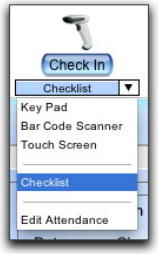




the Attendance Checklist

Manually Recording Attendance

To record attendance using a check list, select Check List from the drop down menu below the Check In button on the Preferences or Styles, Classes & Attendance screen. This is very useful if students do not check themselves into class and you wish to record attendance after a class has been taught.



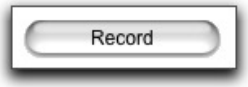
Click the Check In button and select a style of instruction, enter the date of the class attended, then click on a class name from the pick list of available classes for this style.

You'll be asked if you'd like to see a list of students who are enrolled in this class, or a list of students who are enrolled in this style of instruction.

Make your selection, then all students regardless of their status are displayed but active students are displayed first.

On the Attendance Wizard screen, check the blue box if the student was present. You can edit the hours, and select present, late or left early. You can even change the status of a student by clicking on the Status field.

If the majority of the students have attended this class, click the Check All button to quickly check all boxes, then uncheck any students who did not attend.



After you have checked all students who have attended, click the Record button and attendance records will be created for each student.

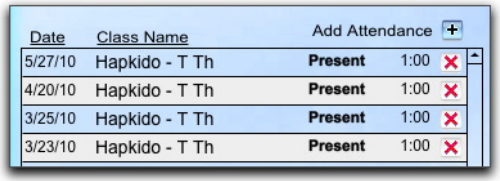
You can also click the Find button to locate students enrolled in other classes, however, in order for a student to be found, he or she must be enrolled in at least one class.

Click Reset to record attendance for a different class.

Click Close to cancel without recording any attendance.

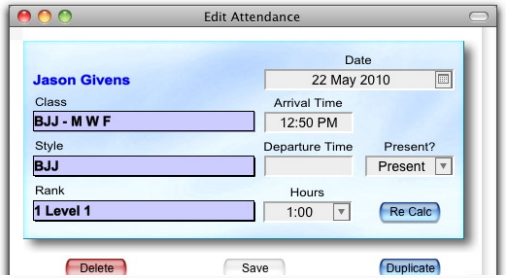
Attendance Recording from the Style Details Screen

If you would like to record attendance for a student after they have attended a class, this can be done on the Style Details screen. To view the Style Details screen go to the Styles, Classes & Attendance screen of the student you wish to record attendance for, then click directly on the desired style of instruction from the list in the top left corner of the screen. This will open the Style Details screen.


Date
Class Name
Add Attendance
5/27/10 Hapkido - T Th Present 1:00
4/20/10 Hapkido - T Th Present 1:00
3/25/10 Hapkido - T Th Present 1:00
3/23/10 Hapkido - T Th Present 1:00

To add an attendance record click the Add Attendance + button above the list of attendance entries.

A dialog box will appear. Click directly on a class name from the pick list of available classes for this style. An attendance record will be create. You can now modify the fields as needed. Click Save to record the attendance entry.



Once you've recorded some attendance, only the attendance dates for the Rank Displayed will be shown. To view previous ranks, select a lower rank from the Rank Displayed drop down menu in the bottom left corner then single click the Update button.

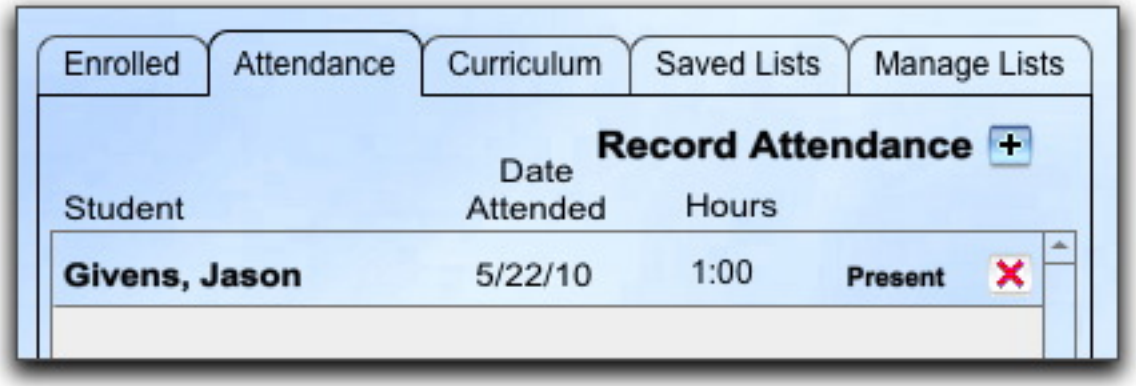
Also, you can use the attendance check list or attendance check in preference 2 to record attendance *after* a student has already attended a class.

Editing the Rank

When viewing the Style Details screen, the Rank field at the top of the screen is a drop down menu. So if you want to change the rank of student without using the Promotions Wizard, you can simply select the a different rank from the drop down menu.

This is very useful if you'd like to enter attendance data for previous ranks. Just don't forget to switch the rank back to what it's supposed to be when you're done.

Attendance Recording from the Class Screen



To record attendance for a student after they have attended a class, go to the Styles, Classes & Attendance screen and click directly on the class name the student is enrolled in or go to the School Info screen and select a class by single clicking it.

This displays the Class Entry screen. Click on the Attendance folder tab, then click the Record Attendance button. Enter the date of the class attended, then click on a class name from the pick list of available classes for this style. A list of all students enrolled in this class will appear.

On the Attendance Wizard screen, check the blue box if the student was present. You can edit the hours, and select present, late or left early. You can even change the status of a student by clicking on the Status field.
If the majority of students have attended this class click the Check All button to quickly check all boxes, then uncheck any students who did not attend.
After you have checked all students who have attended, click the Record button and attendance records will be created for each student.
You can also click the Find button to locate students enrolled in other classes, however, in order for a student to be found, he or she must be enrolled in at least one class.

Click Reset to record attendance for a different class. Click Close to cancel without recording any attendance.

Private Lessons

You can record private lessons and they will be recorded and counted as a class.

First, create class records for each type of private lesson you teach. You'll do this on the School Info screen by clicking the + button beside Classes. Be sure to select a style of instruction. Create as many private class records as you wish, just give each private lesson a unique class name.

When a student attends a private lesson go to their Styles, Classes & Attendance screen, click on the style of instruction of the private lesson and you'll be viewing the Style Details screen.

Now just above the attendance dates on the left, click the Add Attendance button and select the correct private class name from the list of available classes. Select the date, time, etc.

That's it, you've just recorded the private lesson and it's counted with all the other classes this student has attended.

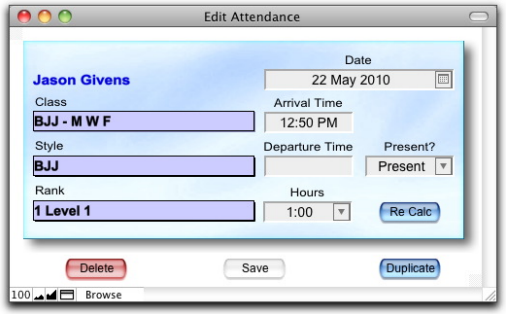
Entering Previous Attendance & Archiving Data

If you've just purchased the Studio Organizer and have just begun to enter student records, there are two ways you can enter previous attendance.

Entering Dates

On the Styles, Classes & Attendance screen click a style of instruction from the list in the top left corner of the screen to display the Style Details screen for this student. Click the Add Attendance button above the attendance entries. You can now select the class the student has previously attended, his or her rank and a date. Click the Duplicate button, select Duplicate Record from the Records menu, or use the keyboard shortcut to quickly duplicate this record. You can enter the number of duplicates you wish to create.

For example, if a student has attended 58 classes, you can enter `58` then click Continue and 58 duplicates of the current attendance record will be created. Changing the date of each record is optional. If you wish to record each individual date, create one duplicate at a time and use the drop down calendar to select the date attended. The Duplicate button is also on the Edit Attendance Wizard screen.



Entering Hours

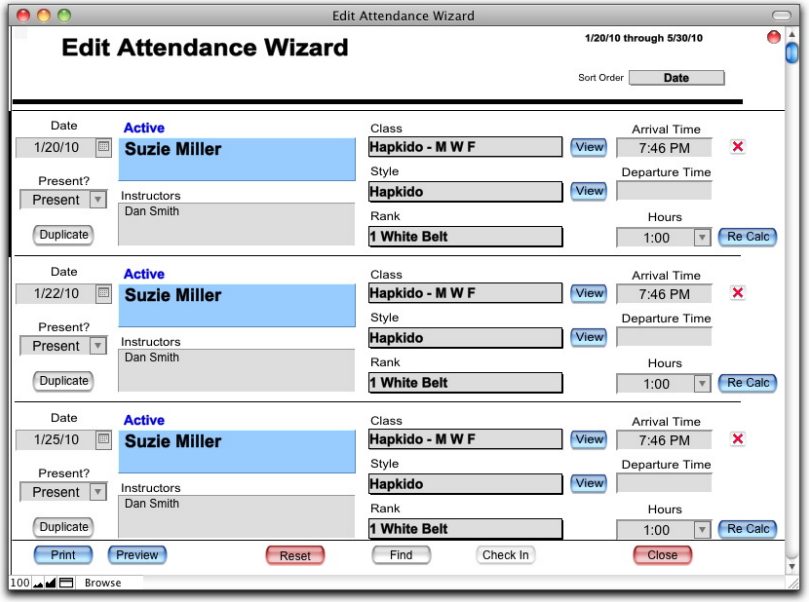
If your students need to accumulate a certain number of hours to be eligible to test, you can enter all of their previous hours in one attendance record.

For example, Jason Givens is a Hapkido Green belt. He's already attended 12 one hour classes. He needs to attend 30 classes to be eligible to test. Go to Jason's Styles, Classes & Attendance screen and single click on Hapkido in the style of instruction list in the top left corner of the screen. This will display Jason's Hapkido Style Details screen. Click the Add Attendance button above the attendance entries. You can now select a Hapkido class, Jason's rank, and a date. Next, modify the hours field to reflect the total number of hours this student has already attended at this rank. Enter `12`. Click the Save button. If Jason's Hapkido Style Details screen is set to display the Green Belt rank, Jason's next test eligibility fields will now show he's attended 12 hours and is 18 hours from being eligible to test.

Archiving Attendance Data

If you wish to remove old attendance data from the Studio Organizer and save it in an archive file, please read *Archiving Attendance Data* in the built in Help.

Attendance Editing



To edit a single attendance record go to the Styles, Classes & Attendance screen or the Style Details screen and click directly on an attendance entry. Edit the entry as needed.

the Edit Attendance Wizard

To quickly modify *many* attendance entries go to the Wizards menu in the menu bar at the top of the screen and select Edit Attendance. Or if you're in check in mode, click the Edit button on the Enter Student # dialog box.

A Find Attendance Dates screen will appear with today's dates automatically entered as the starting and ending dates. You can change those dates, or click the Clear All button to empty all fields. You can also make selections in any of the other optional fields to refine your search, then click Continue. A found set will be created in the Edit Attendance Wizard screen.

The Edit Attendance Wizard allows you to modify all of the attendance fields, except the student's name.
Click the Duplicate button to duplicate the selected attendance record.
Click the View buttons to view a class or style of instruction.
Click the Reset button to refresh the class name, style of instruction, rank and number of hours.
Click the red X to delete the attendance record.

Installation Warning & Creating a Shortcut or Alias

Avoid Duplicate Installations
The free 30 day trial and full working version of the Studio Organizer are the exact same files. There is no need to download or install anything else if you've just purchased the software. All you have to do is open the software with the Master password and enter your Registration Code and the 30 day trial limitations are removed.

Be careful not to install more than one copy of the Studio Organizer on your computer. This can cause significant problems. See *Only One Copy Of The Studio Organizer* at the end of this tutorial or the built in Help for details.

Creating a Shortcut or Alias

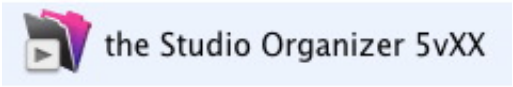
To create an alias or shortcut of the Studio Organizer application, open the *Studio Organizer* folder on your hard drive.

Windows users: Open the *Data* folder.

Select the Studio Organizer 5vXX application. (XX is the version number.)

Windows users: Right click the file, then select Create Shortcut or
Send to -> Desktop shortcut.

Macintosh users: Hold the Control key and click on the file, the select Make Alias.



Place the alias or shortcut anywhere you like. For example the Desktop or Start Menu.

Preventing Expired & Past Due Check Ins

Those are all of the Attendance Check In preferences. Let's now review the check in options you can select for individual students...

Expired Student Cannot Check In

If you wish to prevent a student from checking into class if they are expired, check the *<Student Name> Cannot Check into <Style Name> if Expired* check box at the bottom of the Eligibility & Expiration folder tab on the Style Details screen.

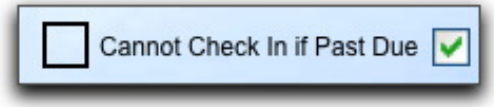
If this box is checked and the student has expired, when this student checks into class an *Access Denied* message will be displayed. You can control how the software responds when a student is denied access. Go to the Preferences screen and click on the Attendance Check In folder tab. There are powerful options such as *Do/Do Not Halt Check In, Do/Do Not Require Password* and *Do/Do Not Record Attendance.*

Replace Buttons

To quickly change many records, use the Replace button. It's a green check mark. You'll find these buttons on a variety of screens. Click the Replace button beside a field to apply the current setting to all records in the found set. Search your records to create a found set or click the Show All button to modify all records. Changes made using the Replace button cannot be undone. Use the Replace buttons with caution. If in doubt, run the Backup Snapshot Wizard first.

Past Due Student Cannot Check In

If you wish to prevent a student with past due invoices from checking into a class, go to the Check In Options folder tab of the Styles, Classes & Attendance screen and check the *<Student Name> cannot Check In if Past Due* check box. This check box is also displayed on the Invoices & Tuition screen.
If this box is checked and the student is past due on any invoice, an *Access Denied* message will be displayed when the student checks in. You can control how the software responds when a student is denied access. Go to the Preferences screen and click on the Attendance Check In folder tab. There are powerful options such as *Do/Do Not Halt Check In, Do/Do Not Require Password* and *Do/Do Not Record Attendance.*

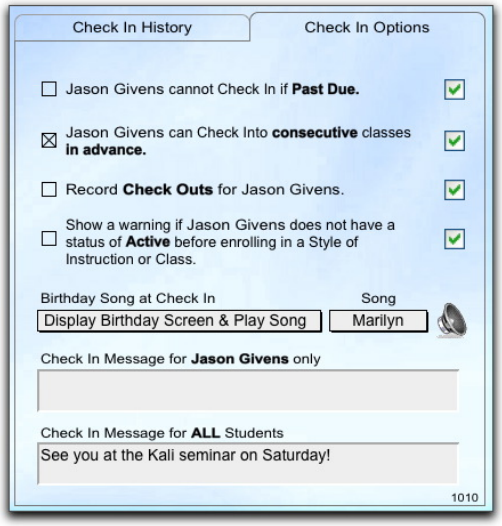


Student Check In Options

On the Styles, Classes & Attendance screen, click the Check In Options folder tab to view the selections for each student.

Advance Check In

Students enrolled in two or more classes that meet on the same day can check themselves into their classes at the *beginning* of the first class. So if your student is enrolled in Hapkido at 7 p.m. and BJJ at 8 p.m. she can scan her card once to check into Hapkido, then she'll be asked if she wants to also check into BJJ at 8 p. m. If she scans her card again, she's checked into BJJ with an arrival time of 8 p.m. If she doesn't scan her card again, the next student simply scans their card to reject the BJJ check in and normal attendance check in scanning resumes. You can also hit the ENTER key on the keyboard to resume normal scanning. In order to allow a student to use this feature, go to the students Styles, Classes & Attendance screen, select the Check In Options folder tab and check the *<Student Name> can Check Into consecutive classes in Advance* box.


Check In History
Check In Options
Jason Givens cannot Check In if Past Due.
Jason Givens can Check Into consecutive classes in advance.
Record Check Outs for Jason Givens.
Show a warning if Jason Givens does not have a status of Active before enrolling in a Style of Instruction or Class.
Birthday Song at Check In
Song
Display Birthday Screen & Play Song
Marilyn
Check In Message for Jason Givens only
Check In Message for ALL Students
See you at the Kali seminar on Saturday!
1010

Checking Out

To allow a student to check out after a class ends go to the Check In Options folder tab on the students Styles, Classes & Attendance screen and check the *Record Check Outs* box. Now when a student scans their card a second time on the same day the software will look for the students first check in record for today and enter the departure time into that record. A brief *Check Out Recorded* message will display. Once a student has checked out that record is flagged in light blue on the Styles, Classes & Attendance screen, but only if the Record Check Outs option is checked.

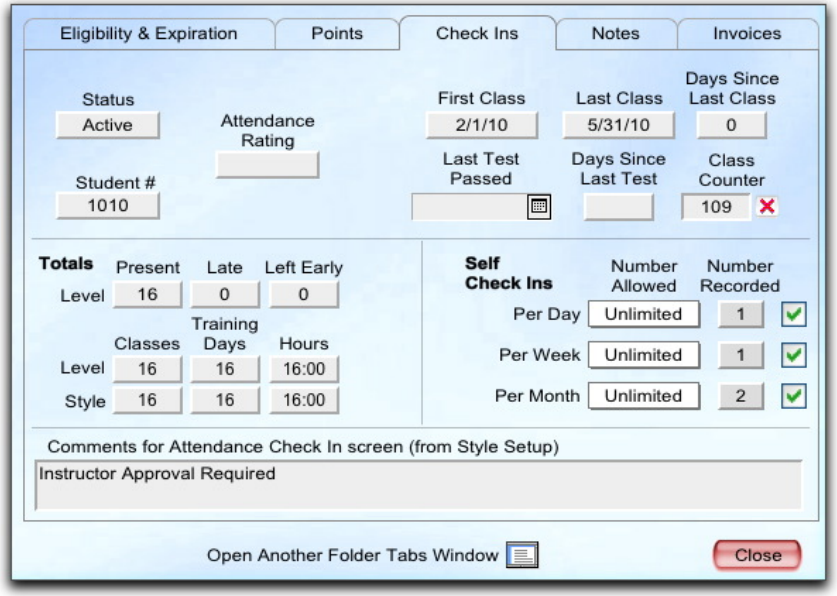
A student can check in and out of one class, then later in the day check into and out of a second class. If a student has checked in several times using the Advance Check In feature, when the student scans their ID card to check out, the class with the *latest* starting time will be selected and the check out time will be recorded into this record.

Adding a Message to the Greeting Screen

To add a unique message to a students attendance greeting, first find the students record, then go to the Styles, Classes & Attendance screen, then click on the Check In Options folder tab and type your message into the *Check In Message for <Student Name> only* field.

To add a message which will be displayed to all students, type your greeting into the *Check In Message for ALL Students* field. This message will appear for every student and display on every attendance greeting screen.

Limiting Check Ins per Day, Week or Month



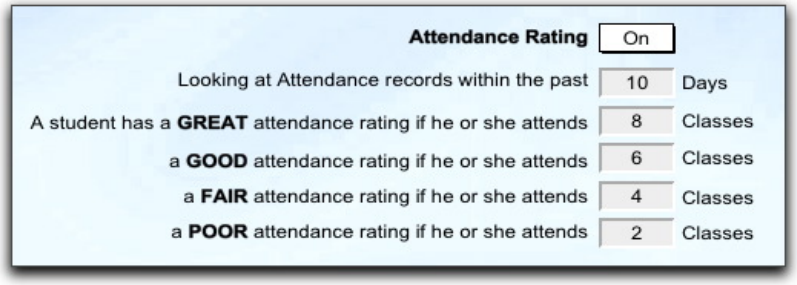
You can limit the number of times a student checks into a class using this style of instruction. You can control the number of self check ins for each day, week and month.

The default number of times a student can check themselves into a class in each style of instruction is set on the Style Preferences folder tab of the Style & Rank screen. The settings you choose here are automatically entered when a student is enrolled into this style of instruction, but can be changed for each individual student. If you alter the Self Check In fields for an individual student those change will always override the default settings for the style.

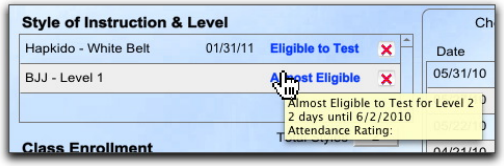
Here's an example: Bill Smith is enrolled in Hapkido, and the default check in number is 1, but Bill's Check ins per Day field on his Style Details screen is set to 3, Bill will be allowed to check into 3 Hapkido classes.

Students enrolled in more than one style can check in according to the settings for each style. For example, if Jane Miller is enrolled in both Hapkido and Kung Fu, and the default Self Check Ins per Day is 1 for Hapkido and 2 for Kung Fu, Jane could check into 3 classes in one day: 1 Hapkido plus 2 Kung Fu classes. Be sure to review your settings at the bottom of the Attendance Check In folder tab of the Preferences screen to see how halted attendance will perform. There are powerful options such as *Do/Do Not Halt Check In, Do/Do Not Require Password* and *Do/Do Not Record Attendance.*

Attendance Rating



Attendance Rating is an optional feature. To turn enable Attendance Rating, go to the School Info screen and click on a style of instruction, then click on the Style Preferences folder tab. Set the Attendance Rating field at the bottom of the screen to *On* if you wish to use it. If you do not wish to rate student attendance, set the Attendance Rating drop down menu to *Off*.



Select the number of days used by this feature. If you would like to evaluate attendance based on the past 10 days, enter `10` in the Days field. Use the remaining fields to enter the number of classes a student must attend for the Great, Good, Fair and Poor ratings.

Once you have begun to record attendance for a student the Attendance Rating is displayed on the Check Ins folder tab on the Style Details screen. Or you can go to the Styles, Classes & Attendance screen and hold the mouse over the status field in the style of instruction area until the yellow tool tip is displayed.

If a student has not attended any classes within the number of days specified, the Attendance Rating for that student will display *None*.

Staff Clocking In and Out

Staff members can clock in or out while students are using the attendance check in feature to check themselves into class. There are several options for checking in and out, depending on the hardware you are using.

Bar Code Scanner
If attendance is being recorded using only a bar code scanner, staff members can clock in or out by scanning a Clock In or Clock Out bar code prior to scanning their ID card.

To print out the Clock In and Clock Out bar codes, go to Reports menu, select ID Cards from the Category menu, then single click on Bar Codes. Click the Create It button to print the Bar Codes page. Place this page next to your bar code scanner. Now staffers can scan the Clock In or Clock Out bar code, then scan the bar code on their Staff ID card.

Hand Typing the Employee #'s
Type "cin" (no quotes) then the Employee # to Clock IN.
Type "cout" (no quotes) then the Employee # to Clock OUT.
Next, the employee has three options:
1) They can enter their Employee # as displayed on the Staff screen.
2) They can enter the password they use to open the software.
3) They can enter the passcode assigned to their student record, provided the Student # and the Employee #'s are the same. (Please read *When A Staffer Is Also A Student* for details.)

Some examples:
If a staffers Employee # is "1231" he can enter "cin1231" (no quotes) to clock in.
If a staffers log in password is "teacher789" he can enter "coutteacher789" (no quotes) to clock out.
If a staffers passcode for his student record is "speedy" he can enter "cinspeedy" (no quotes) to clock in, provided the Student # of his student record is the same as his Employee # in his staff record.

Touch Screen
If students are using the touch screen feature to check into class, staffer can touch the In or Out button then enter their Employee #, their password, or the passcode assigned to their student record, provided the Student # and the Employee #'s are the same. (Please read *When A Staffer Is Also A Student* for details.)

When a Staffer is also a Student

There's a fourth time card option which does not use the attendance check in feature.

Recording Hours from the Staff Screen
If a staff member forgets to clock in or out, you can easily add a time card entry. Just go the Staff screen, find the staffers record and click the + button on the left side of the screen in the Time Card entries section.

Enter a date and time, then select In or Out. Hit the ENTER key on your keyboard, or click Save & Add Another to add more time card entries for this staff member. Click the Save button to exit.

When a Staffer is also a Student
If you have a staff member who is also a student, you can issue them one ID card which can be used both for classes and for clocking in and out.

To do this:

1) Create a *student* record for this person and make a note of the Student # on the top right corner of the Student Info screen.

2) Create a *staff* record for this person, and CHANGE the Employee # to this person's Student #.

3) Click the Print button on the Staff screen and select an ID card design.

4) Print the Staff Information sheet, then clip out the ID card.

For this staff member, class attendance is recorded just like any other student.

Clocking in and out is requires scanning the clock in or clock out bar code. See the previous page for all of the clocking in and out options.

Dedicating a Computer to Attendance Recording

The Studio Organizer must *always* be the foreground application and in attendance check in mode to record attendance. Attendance cannot be recorded in the background while other applications are being used. Since it is not possible to record attendance while performing other tasks in the Studio Organizer, you may want to dedicate a computer to attendance recording. There are two ways to do so. Both of these options are explained in detail in the *Working with Data* tutorial as well as the built in Help.

Free Option - No Networking Required
Since networking the Studio Organizer requires additional hardware and software, a Wizard has been created that allows you to have a computer recording attendance only at the front desk.

This is a free option. No special license or additional software is required.

Networking the Studio Organizer

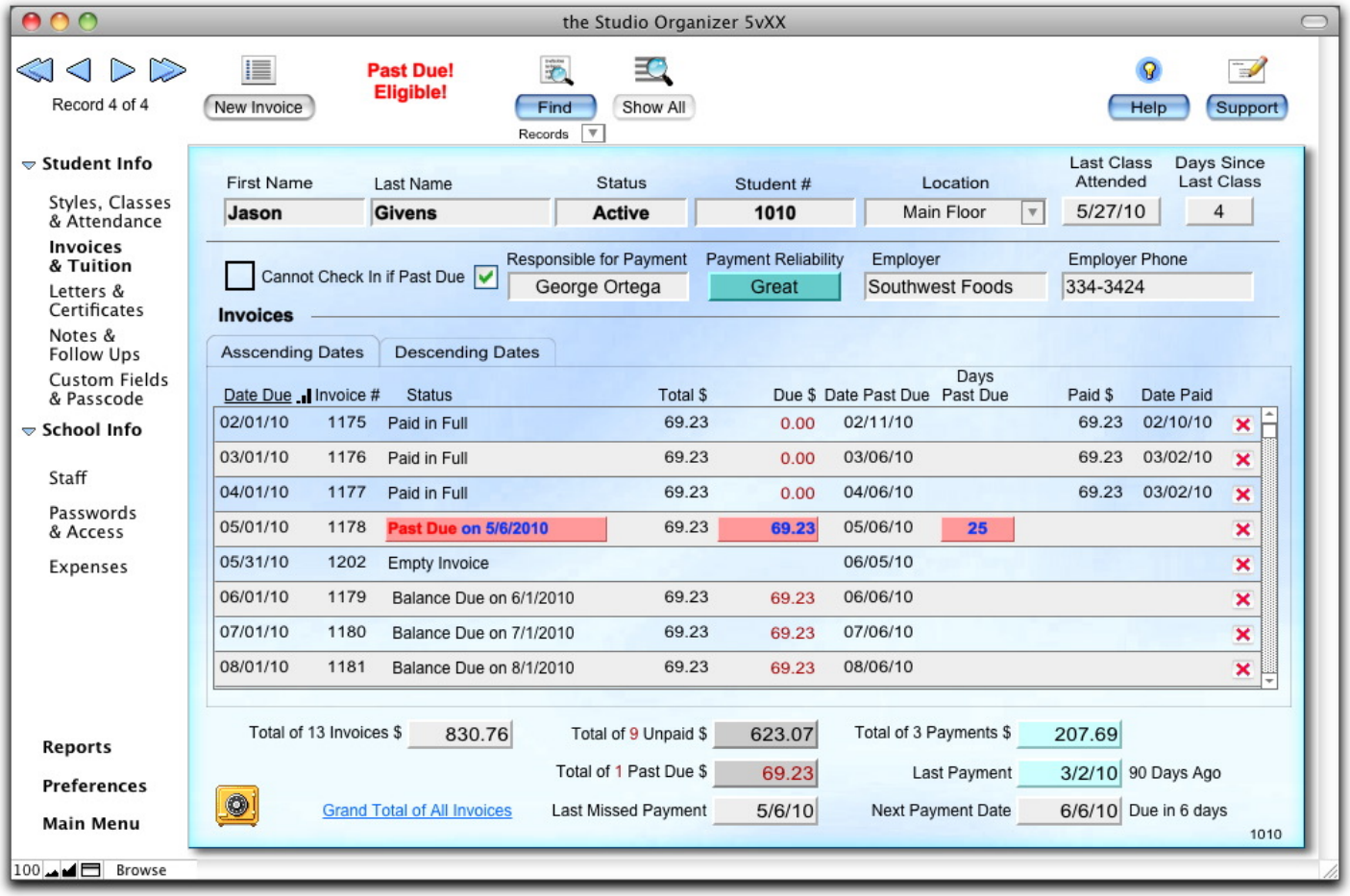
Networking is a great way to share the Studio Organizer with everyone in your office, but it requires additional hardware and software. Networking is an optional feature which allows you to share the Studio Organizer in real time between two to nine computers on a network. (If you wish to network more than nine computers, please contact technical support for details.) You'll need a professional to set up the wiring and hubs.

The Studio Organizer.com does not charge any additional fees for a user to network, however, FileMaker Pro software must be purchased and installed on each computer. You can purchase the FileMaker Pro 11 software from any source you wish, such as www.softwaremedia.com. The cost is roughly $300 per computer. (Do not purchase the Advanced or Server versions.)

Since it's not possible to record attendance while using other features of the Studio Organizer on a single computer, networking is a great way to dedicate a computer to attendance check in, but it's not required. To spare you the expense of networking, the Studio Organizer offers you the ability to dedicate a computer to attendance recording without networking. Please read *Attendance Computer: No Network Required* in the built in Help or the *Working With Data* tutorial.

Purchasing and installing the FileMaker Pro software allows users to network as well as create PDF files, export to Excel, and more.

Invoices & Tuition

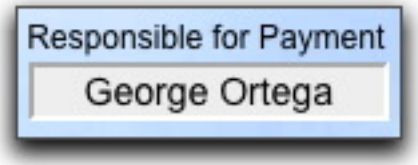


the Invoices & Tuition screen

the Invoices & Tuition Screen

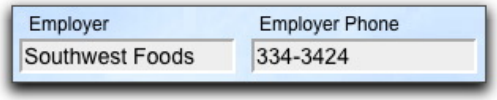
Now we're going to discuss the most important feature of the Studio Organizer, the invoicing system. Click on Invoices & Tuition in the column on the left side of the screen.

Tool tips
On the Invoices & Tuition screen hold the mouse over the Total $ field and after a brief delay a yellow tool tip will appear displaying the items on the invoice. Hold the mouse over the Paid $ field and the payments received are displayed.



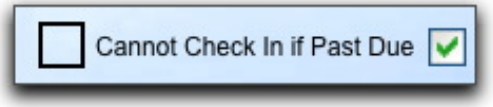
Person Responsible for Payment
On the Invoices & Tuition screen you can enter the person who is responsible for making payments if it is not the student. If the Person Responsible for Payment field contains a name, each time you create a new invoice you will be asked to select the name that should appear on the invoice: the person responsible for payment or the student.

The student's name will appear below the person responsible for payment on invoices and coupons.



Employer
The Employer and Employer phone fields are optional fields on the Invoices & Tuition screen.

Past Due Student Cannot Check In
If you wish to prevent a student with past due invoices from checking into a class, go to the Check In Options folder tab of the Styles, Classes & Attendance screen and check the *<Student Name> cannot Check In if Past Due* check box. This check box is also displayed on the Invoices & Tuition screen.
If this box is checked and the student is past due on any invoice, an *Access Denied* message will be displayed when the student checks in. You can control how the software responds when a student is denied access. Go to the Preferences screen and click on the Attendance Check In folder tab. There are powerful options such as *Do/Do Not Halt Check In, Do/Do Not Require Password* and *Do/Do Not Record Attendance.*



Payment Reliability
The Payment Reliability field is based on the timeliness of payments.

Excellent = rarely late
Great = a few late payments
Good = several late payments
Poor = frequent late payments

Invoices Totals
At the bottom of the Invoices & Tuition screen you'll find several fields that total the payments and invoices of each student. None of the fields are modifiable, but you can perform finds in these fields.

Grand Total of All Invoices
At the bottom of the Invoices & Tuition screen, you can click the *Grand Total of All Invoices* link to display the totals of all invoices for all students in the found set.
To see a grand total of everything click the Show All button at the top of the screen then click *Grand Total of All Invoices*.

the Vault
On the Invoices & Tuition screen, in the lower left corner is an icon of a bank vault. *The Vault* is used to store sensitive information such as bank account information. **Storing complete credit card numbers on your computer is no longer allowed.** The information in the vault is automatically encrypted using a state of the art 448-bit encryption algorithm similar to that used by the US government.

The vault is protected by an extra password request. Only the Master password or passwords with Admin access can view the data in the vault. The Guest password cannot access the vault once the software has been registered. For detailed information about the vault, click the Help button on the vault screen.

If you use a billing company to collect tuition, you will store bank account information in the vault. See the *Electronic Funds Transfers* category in the built in Help for details.
To access the vault from the Invoice Entry screen, click the EFT button, then click the Vault button.

Creating, Editing & Deleting Invoices

Creating an Invoice
To create a new invoice for a student, go to the Invoices & Tuition screen and single click the New Invoice button at the top of the screen.
Or click directly on the word Invoices on the top left side of the invoice list, under the large *Cannot Check In* check box.
Or select Quick Invoice from the Wizards menu.
Or click the Quick Invoice button on the Main Menu then scan or type in the Student #.

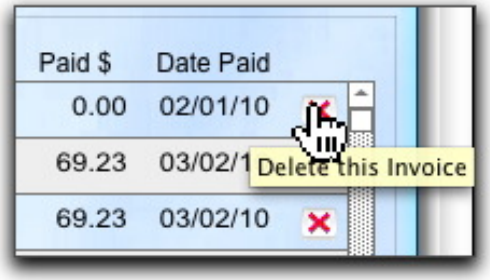
Walk Ins: How to Create an Invoice
There's no need to create a student record for someone who's only going to buy from you once. What you can do instead is create a record on the Student Info screen and enter Walk In into the First Name field. Make a note of the student number, or change it to a unique number that's easy to remember. You can also print and ID card and keep it by the register.

The next time a walk-in customer wants to purchase something, click the Quick Invoice button on the Main Menu, type or scan in the student number for the Walk In record, and create the invoice.

Editing an Invoice
To edit an invoice go to the Invoices & Tuition screen and single click directly on the invoice.

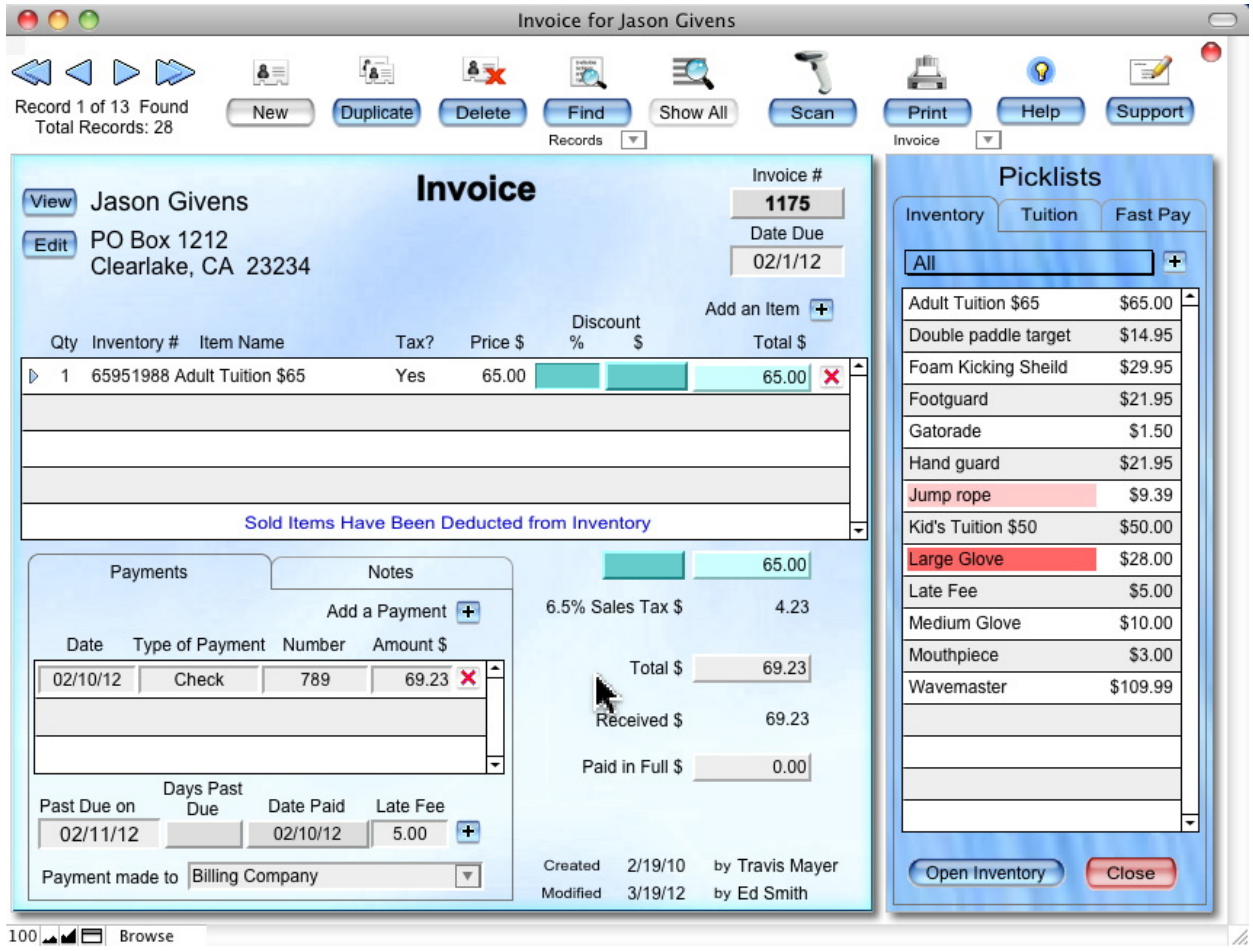
Deleting an Invoice
To keep an invoice, but exclude it from certain reports, delete the due and past due dates.

To delete an invoice single click the Delete button on the Invoice Entry screen or go to the Invoices & Tuition screen and single click on the red X to the right of the invoice.



WARNING! Invoice deletion is permanent and cannot be undone.
All sold items and payment information is also deleted.

Delete an Item from an Invoice
To remove an item on an invoice, click the red X to the right of the item.



the Invoice Entry Screen

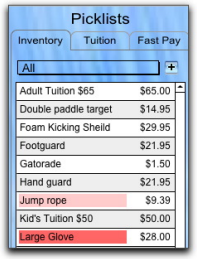
Creating an Invoice

Let's create an invoice for a student...

To create a new invoice for a student, go to the Invoices & Tuition screen and single click the New Invoice button at the top of the screen.
Or click directly on the word Invoices on the top left side of the invoice list, under the large *Cannot Check In* check box.
Or select Quick Invoice from the Wizards menu.
Or click the Quick Invoice button on the Main Menu then scan or type in the Student #.

There are several ways to add items to an invoice.

Enter Manually
To add an item to an invoice, click the Add an Item + button on the top right side of the list of items.



Enter the quantity and the inventory #. If the inventory # matches the number of a record in the inventory module, all the remaining fields will be filled in. See the School Setup tutorial to learn how to enter inventory items.

Inventory Pick List
To add an item to an invoice from the inventory pick list, select the Inventory folder tab on the right side of the screen and then select a category.
Single click the item wish to add to the invoice.

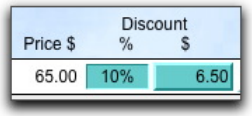
Tuition Pick List
If you have duplicated invoices or linked students, you can view a list of tuition fees that are included in other invoices. Go to the Tuition folder tab on the right side of the screen, and single click on a tuition item to move it to this invoice.

Scan Inventory # Bar Codes
To scan bar codes of inventory items, click the Scan button at the top of the screen. Scan the bar code of the item you are selling. The quantity will default to 1, but this can be edited.

Once you have entered an item into an invoice click the blue arrow to the left of the item to edit it. Some fields can be edited by clicking directly into them.

Discounts, Due Dates, Late Fees & Freight

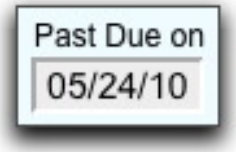
Discounting an Item



To discount an item, single click into the green Discount Percentage field on the Invoice Entry screen. A drop down list will appear. Make a selection and the discount amount will appear in the Discount Amount field.

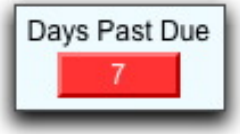
If you'd rather enter a fixed dollar amount as a discount, for example, you'd like to take $5 off the price of an item, don't use the Discount % field. Instead create an new line on the invoice:
Qty = `1` Description = `$5 Discount` Price = `-5` Be sure to enter a negative dollar amount.

The total amount discounted is displayed at the bottom of the invoice when it is printed. If no discounts are applied, no discount verbiage appears on the invoice.



Due Dates

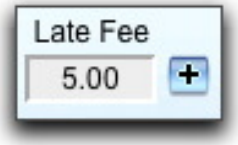
To change the date an invoice is due, click into the Date Due field below the Invoice # and select a date from the drop down calendar. The Past Due On field is located on the Payments folder tab.



The default for determining the Past Due On date is set on the Invoices folder tab of the Preferences screen, but the Past Due On field can be changed to any date you wish. Click into the field and select a date from the drop down calendar.

If an invoice hasn't been paid by the Past Due On date the Days Past Due field will display the number of days this invoice is overdue.
If the Date Due or Past Due On fields are left blank the invoice may not appear some reports.

Late Fees



Late fees are not automatically entered into an invoice. To enter a late fee, single click the Late Fee + button on the Payment folder tab of the Invoice Entry screen. The late fee is added to the invoice as a line item. The default late fee amount is set the Invoices folder tab of the Preferences screen but it can be changed for individual invoices.

Freight Charges

If you wish to add a freight charge to an invoice, click the Add an Item and enter a Quantity = `1`, Description = `Freight` and Price = the freight amount. Set the Tax? field to taxable or nontaxable depending on how freight is taxed in your region.

Invoice Options

Setting the Title of an Invoice
The heading at the top of an invoice can be changed to Invoice, Tax Invoice, Receipt, Reminder, or anything you wish.

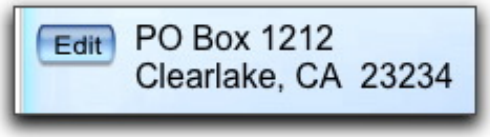
To change the title, click into the title field in the middle of the screen. It's a drop down menu. Make a selection from the list. If you'd like to enter something not in the list, click into the field a second time and the drop down menu will disappear. Now type a new invoice title.

Payments Made To
Use the Payments Made To field on the Payments folder tab of the Invoice Entry screen to record whom the student pays.

Some examples: School, Billing Company, Pay Pal, EFT...

The drop down menu for the Payments Made To field is self populating. It is empty until an entry is made. Thereafter, any entries made to this field are automatically included in the drop down menu.

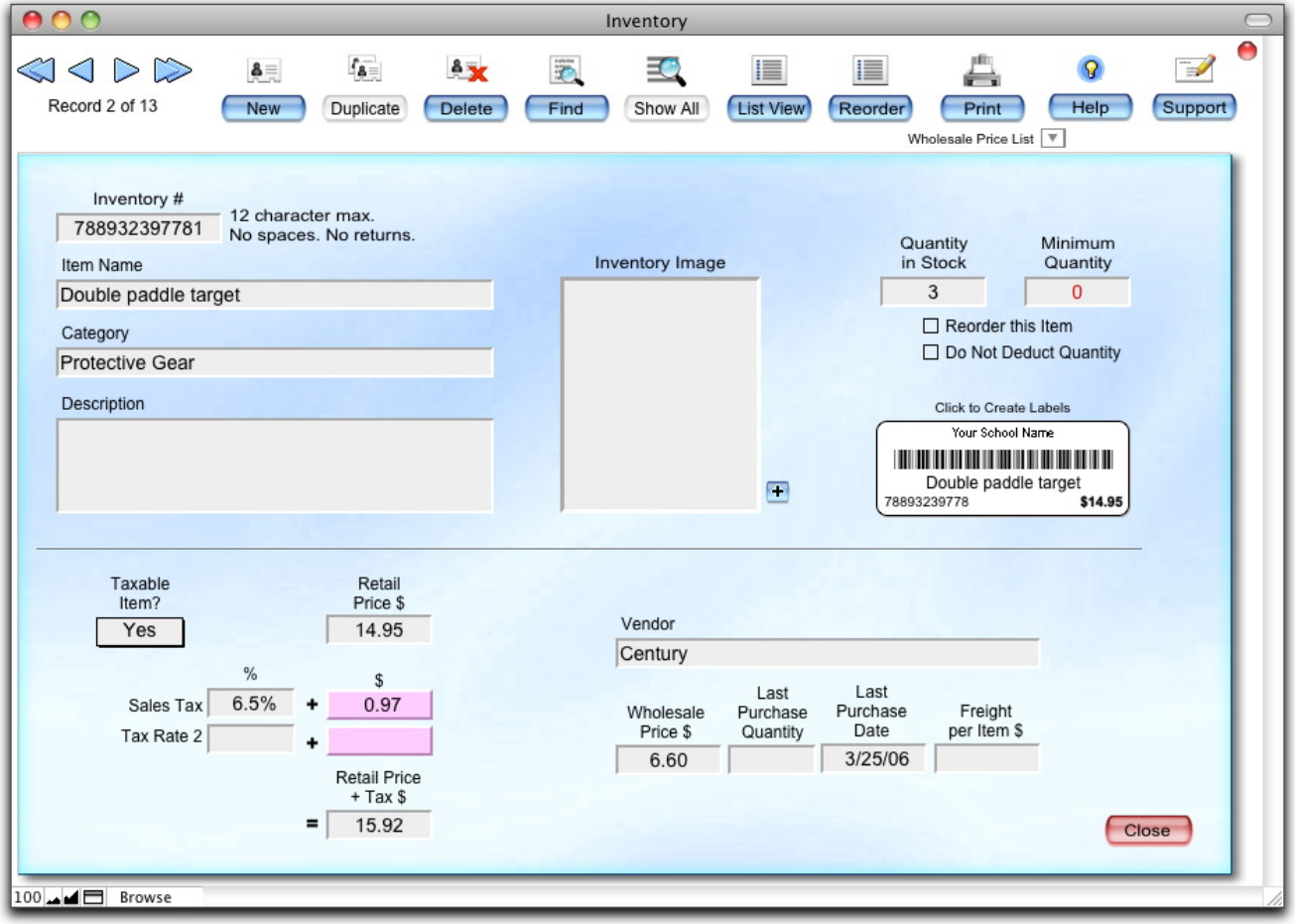
Editing the Invoice Address
Invoices use the default address at the time the invoice is created. The default address is set on the Billing address folder tab of the Student Info screen.



To change the address on an invoice, click the Edit button to the left of the address. Select the Home or Billing address, then click Update Found Set or Update This Invoice. You can use this procedure if you have changed a student's address and wish to update an existing invoice to the new address.

To change the default address, go to the Student Info screen then click on the Billing folder tab above the address fields. Select Home or Billing from the Default Address drop down menu.

Updating Inventory



In order for your inventory to be updated after a sale has been completed, print an invoice or receipt. Or if you do not wish to print an invoice or receipt set the drop down menu below the Print button on the Invoice Entry screen to Update Only. Be sure to *always* click the Print button in order for your inventory to be updated, even if it's set to Update Only.

When inventory is updated, the Quantity in Stock field of a sold item is reduced automatically. If you do not wish to update the quantity of an item, check the *Do Not Deduct Quantity* check box on the inventory screen. For example, you would not wish to deduct the quantity of tuition inventory records.

Tuition Fees - Creating Recurring Invoices

You can create invoices for recurring tuition payments by using the Duplicate button on the Invoice Entry screen.

First, create one invoice which contains the tuition fees you wish to duplicate. To add a tuition fee to an invoice from the inventory pick list, select Tuition from the category drop down menu on the Inventory folder tab on the right side of the screen. Single click on a tuition item to add it to this invoice. When you are ready to duplicate an invoice, click the Duplicate button on the Invoice Entry screen.

If you charge weekly or month to month tuition, use:
Duplicate this Invoice every <blank> days
or
Duplicate this Invoice every <blank> day of the month.

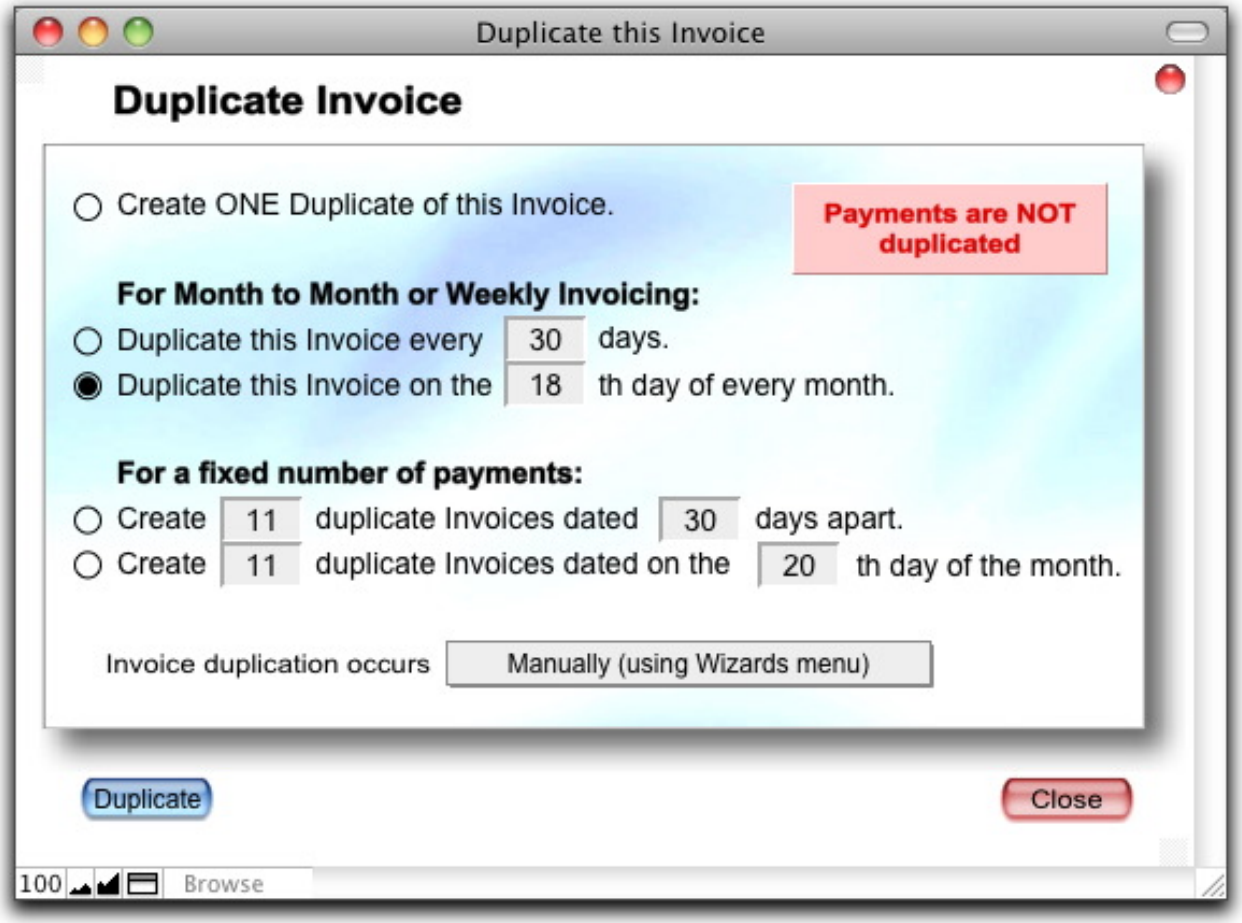
If you have an annual contract with a fixed number of payments use:
Create <blank> duplicate Invoices dated <blank> days apart
or
Create <blank> duplicate Invoices dated on the <blank> day of the month.

At the bottom of the Duplicate Invoice screen, select *Invoice Duplication occurs Manually (using Wizards menu)* or *Automatically (at Startup).* Click the Duplicate button and the invoice duplication will begin.

Entering a Down Payment
If you require a down payment, after invoices have been duplicated, go to the first invoice for this students tuition and add the down payment fee. Items can be added to an invoice at any time. Or you can create a new invoice for the down payment alone, depending on how your student would like to pay.

Annual Fees
If students are required to pay a recurring annual affiliation or professional organization fees, go to the first tuition invoice for this student and add the annual fee. Or you can also create a new invoice for the annual fee. To make this invoice reoccur a year from now, click the Duplicate button, and select *Duplicate this Invoice every <blank> days* and enter `365` days.

Let's explain the invoice duplication feature in more detail...


Duplicate this Invoice
Duplicate Invoice
Create ONE Duplicate of this Invoice.
Payments are NOT duplicated
For Month to Month or Weekly Invoicing:
Duplicate this Invoice every 30 days.
Duplicate this Invoice on the 18 th day of every month.
For a fixed number of payments:
Create 11 duplicate Invoices dated 30 days apart.
Create 11 duplicate Invoices dated on the 20 th day of the month.
Invoice duplication occurs
Manually (using Wizards menu)
Duplicate
Close
100
Browse

the Invoice Duplication Dialog box

Duplicating an Invoice

Invoice duplication occurs either automatically when you open the Studio Organizer, or manually by selecting Auto Dup Invoices from the Wizards menu. You decide which method is used by making a selection on the Invoices folder tab of the Preferences screen. This preference can also be selected from the Invoice Duplication dialog box.

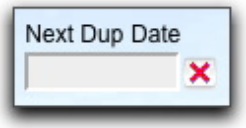
It's important to note that payments made to an invoice are *not* duplicated.

First, create one invoice that contains the tuition fees you wish to duplicate. Then click the Duplicate button on the Invoice Entry screen.

When you use the Duplicate button at the top of the invoice screen you have five duplication options:

Duplicate Invoice Once
Makes one duplicate of the current invoice.

Duplicate this Invoice Every <blank> Days
This option is great for weekly, month to month, or annual tuition fees. Use this duplication method to automatically create invoices for an indefinite period of time.

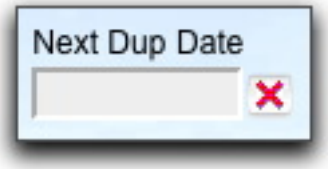


Select this option, enter a number of day, then click the Duplicate button. The Next Dup Date is automatically entered for you, but you can change it to any date you wish. The Next Dup Date appears on the Notes folder tab of the Invoice Entry screen.

This invoice will be duplicated on the Next Dup Date, and the Due and Past Due On dates will be automatically calculated.

Invoice duplication will continue indefinitely. Click the red X next to the Next Dup Date field to stop duplicating this invoice.

Duplicate this Invoice Every <blank> Day of the Month
Use this option for month to month students who will be paying on the same day each month. Invoice duplication will continue until you cancel it.



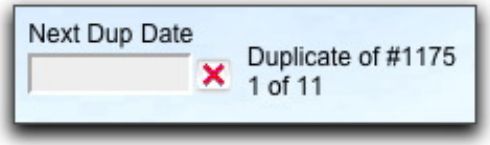
Select this option, enter a day of the month, then click the Duplicate button. The Next Dup Date is automatically entered on the Notes folder tab. However you can change it to any date you wish.

This invoice will be duplicated on the Next Dup Date and the Due and Past Due On dates will be automatically calculated.

Invoice duplication will continue indefinitely. Click the red X next to the Next Dup Date field to stop duplicating this invoice.

Create <blank> Duplicate Invoices Dated <blank> days apart
Use this option if you'd like to create a set number of invoices that will be due in the future, spaced a certain number of days apart. Use this option if a student is agreeing to pay a fixed amount of tuition for a fixed number of months.

For example, if a student signs an annual contract and agrees to pay $55 every month for a year, create a $55 invoice, then Duplicate it selecting 11 duplicates 30 days apart.



Click the Duplicate button and 11 invoices will be created exactly the same as the original, but with Due Dates 30 days apart.

On the Notes folder tab, beside the Next Dup Date, you'll see a reminder that this invoice is a duplicate.

Create <blank> Duplicate Invoices Dated on the <blank> day of each month
Use this option if you'd like to create future invoices all due on the same day of the month. This works great if you have an annual tuition plan with monthly payments and a fixed payment date.
For example if a student is to pay $80 on the 5th or each month for 12 months, create a $80 invoice, click the Duplicate button and select 11 duplicates due on the 5th day of the month. Click the Duplicate button and 11 invoices will be created exactly the same as the original but with due dates of the 5th of each month.

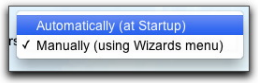
Duplicating Invoice Comments
To choose whether or not invoice comments are included when invoices are duplicated, go to the Preferences screen and click on the Invoices folder tab. Select *Do* or *Do Not Duplicate comments when Duplicating Invoices*.

the Auto Dup Invoices Wizard
Select the Auto Dup Invoices Wizard from the Wizards menu at the top of the computer screen any time you want to create the reoccurring invoices you have set up using the Duplicate button on the Invoice Entry screen. Even if invoices are set to duplicate automatically, you can run this Wizard any time you wish.

The Auto Dup Invoices Wizard duplicates any invoices that have today's date, or any date previous to today in the Next Dup Date field. If no invoices are found, no duplication will occur. If one or more invoices are due for duplication a dialog box will appear displaying the number of invoices to be duplicated. Click Duplicate to begin the duplication process. After invoices have been duplicated a dialog box will appear to confirm the duplication.

Click Find Empty to search for invoices which are set for duplication but do not contain any items. It is recommended you delete empty invoices, or turn off duplication for an empty invoice by clearing the Next Dup Date field.

The default for invoice duplication can be set on the Invoices folder tab of the Preferences screen.
If you select *Manually (using Wizards menu)* invoice duplication will only occur when you select Auto Dup Invoices from the Wizards menu.
If *Automatically (at Startup)* is selected, each time the Studio Organizer is opened a dialog box will appear asking if you would like to duplicate invoices. Click Cancel if you do not wish to duplicate invoices at this time.

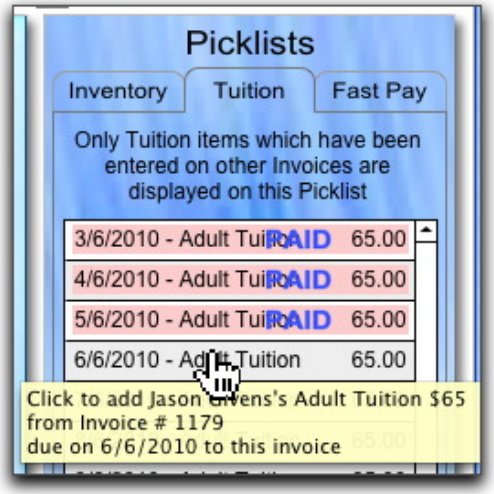


Tuition Fees - Adding to an Invoice

Now that you've duplicated an invoice, you'll have a record of expected future payments. Here's where the real power of the Studio Organizer begins to work for you...

To add a *new* tuition item to an invoice, click the Inventory folder tab on the right side of the Invoice Entry screen. If you have entered tuition records into the inventory module (see the *School Setup* tutorial), set the category to Tuition and single click on a tuition item to add it to this invoice.

Please note all tuition inventory records must have the category set to *Tuition* or they will not display on the pick lists.


Picklists
Inventory
Tuition
Fast Pay
Only Tuition items which have been entered on other Invoices are displayed on this Picklist
3/6/2010 - Adult Tuition PAID 65.00
4/6/2010 - Adult Tuition PAID 65.00
5/6/2010 - Adult Tuition PAID 65.00
6/6/2010 - Adult Tuition 65.00
Click to add Jason Owens's Adult Tuition $65
from Invoice # 1179
due on 6/6/2010 to this invoice

To add an *existing* tuition fee which appears on an another invoice, click the Tuition folder tab on the right side of the Invoice Entry screen. This pick list displays all tuition line items on any invoices you've duplicated for this student.

To see the details of a tuition item hold the mouse over the item for a few seconds until the yellow sticky note is displayed.

Tuition which has been paid will be stamped *Paid*. A tuition entry with a red background is already on the currently displayed invoice.

Single click on a tuition entry and it will be added to the current invoice. You can use this feature if a student wishes to make advance tuition payments, or is past due and needs to pay several tuition payments on one invoice.

To display tuition items which appear on invoices of *linked* students, check the *Display Tuition for Linked Students* check box. If you have recently linked a student and the linked tuition items do not appear in the list, uncheck then recheck the *Display Tuition for Linked Students* check box.

When you add a tuition payment from a linked student to the current invoice, this is recorded in the comments fields of both invoices.

Linking Tuition

The Studio Organizer allows you to easily record a one student paying another's tuition. For example, Bob Miller and his son Fred are both students at your school. Fred normally each pays his own tuition, but occasionally Bob pays Fred's tuition.

First, **link** Bob and Fred's student records on the Student Info screen. This is done by clicking the Linked Students button and selecting the name of the student.

Next, use the Duplicate button to create invoices for the tuition payments Bob will make, then do the same to create invoices for the tuition payments Fred will make.

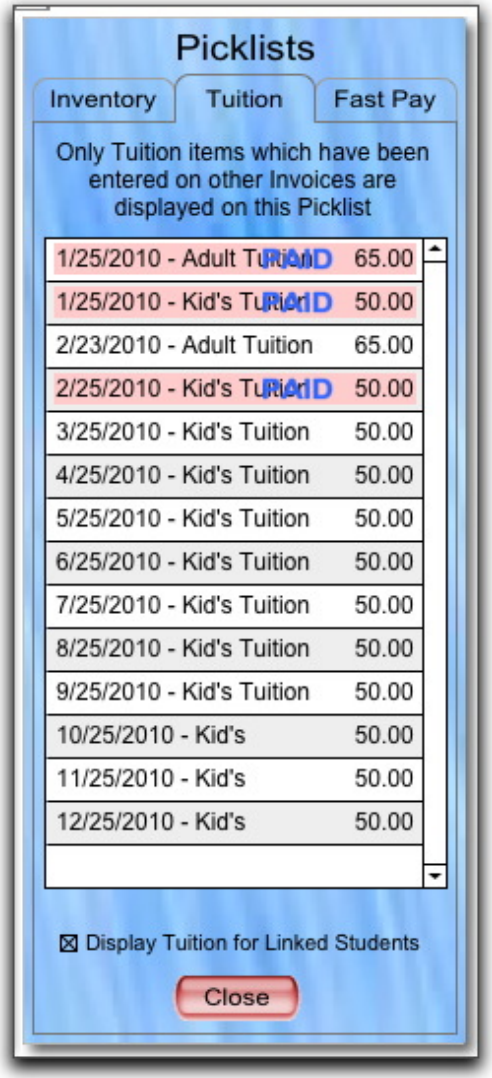
Now if Bob Miller wants to pay his tuition *and* Fred's tuition this month, open Bob's most current invoice with the current tuition payment and click on the Tuition folder tab on the right side of the screen. Check the *Display Tuition for Linked Students* check box.

Now all of Fred's tuition entries will be displayed in the Tuition pick list. If you've recently linked students, and Fred's tuition items do not appear in this list, uncheck then recheck the *Display Tuition for Linked Students* check box.

To see the details of a tuition item on the Tuition folder tab, hold the mouse over the item for a few seconds until the yellow sticky note is displayed.

Single click on the next tuition payment Fred should be making to add it to Bobs' invoice. Comments are automatically entered on both invoices stating Bob made this payment on Fred's behalf.

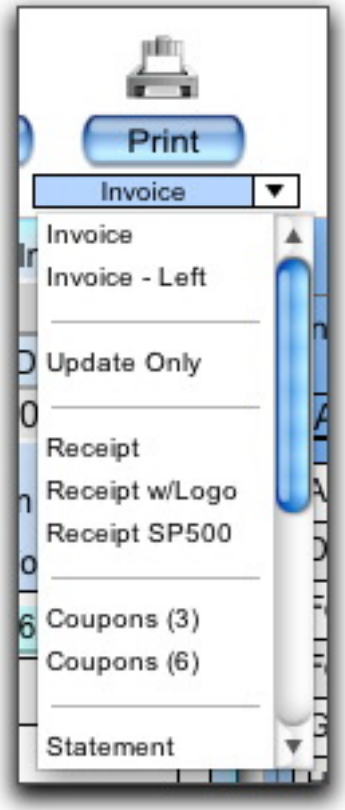
Also, the tuition line item is *removed* from Fred's invoice where the tuition item was originally recorded. If the tuition payment was the only item on the original invoice, that invoice will now be empty and have a zero balance, but the Comments field will remind you that Bob made this payment.


Picklists
Inventory
Tuition
Fast Pay
Only Tuition items which have been entered on other Invoices are displayed on this Picklist
1/25/2010 - Adult Tuition PAID 65.00
1/25/2010 - Kid's Tuition PAID 50.00
2/23/2010 - Adult Tuition 65.00
2/25/2010 - Kid's Tuition PAID 50.00
3/25/2010 - Kid's Tuition 50.00
4/25/2010 - Kid's Tuition 50.00
5/25/2010 - Kid's Tuition 50.00
6/25/2010 - Kid's Tuition 50.00
7/25/2010 - Kid's Tuition 50.00
8/25/2010 - Kid's Tuition 50.00
9/25/2010 - Kid's Tuition 50.00
10/25/2010 - Kid's 50.00
11/25/2010 - Kid's 50.00
12/25/2010 - Kid's 50.00
☒ Display Tuition for Linked Students
Close

Invoice Printing Options

On the Invoice Entry screen below the Print button is a drop down menu.

Select **Invoice** then click the Print button to print a full page invoice. The invoice title you've selected (Invoice, Tax Invoice, Reminder, Receipt) will be used.
Invoice - Left will print an invoice with the school's return address and the invoice address on the left side. Use a # 9 double window envelope to mail this invoice.



Update Only will not print anything, but inventory will be updated for all items on this invoice.

Receipts are used if you have an optional receipt printer. You can print receipts by selecting Receipt, Receipt w/Logo or Receipt SP500.
The Studio Organizer.com does not sell or support receipt printers and cash drawers, but the receipt printing features of the Studio Organizer were programmed using the Star Micronics TSP line of receipt printers. Please see the Receipt Printers & Cash Drawers link on the Features page of www.StudioOrganizer.com for more information about receipt printers.

Coupons will create a coupon summarizing each invoice. The number indicates the number of coupons per page.

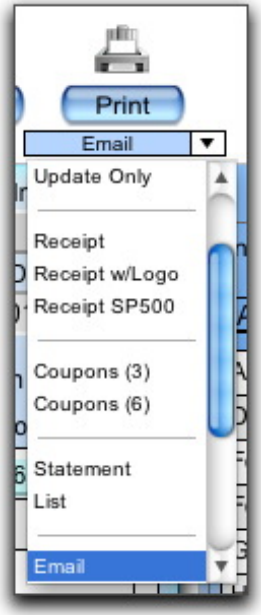
Statement summarizes invoices by student.

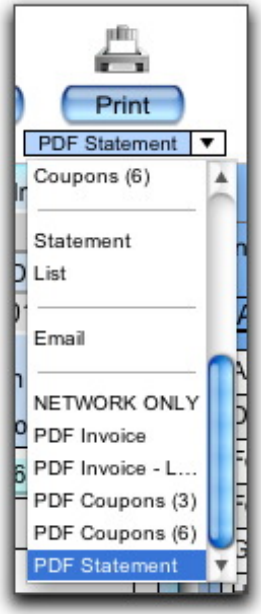
There are three types of invoice reports: Detailed, Brief, and the Vault.
The Vault report contains bank and other sensitive information and can be printed or exported if you use a billing company to collect tuition. (An Admin level password is required.)

Email creates a text only email message of an invoice in your email software. This features only works with your default email application and cannot be used with America Online or web based email such as Yahoo, gmail or Hotmail.

Network Only
The remaining PDF options are only available if you have a full working version of FileMaker Pro installed on each computer, which usually only applies to network users.

Emailing Invoices & Creating PDF's





Emailing Invoices
How your computer handles email is determined by your email preference on the General folder tab of the Preferences screen and the email software you are using. The Studio Organizer does not send or receive email.

This features creates a text only version of an invoice and hands it off to your email software for delivery. It requires a dedicated email application such as Windows Live Mail, Outlook, Entourage or Mail. It cannot be used with America Online or web based email services such Yahoo, gmail or Hotmail.

You can email an invoice from the Invoice Entry screen. Select Email from the drop down menu below the Print button, then clicking the Print button.

If you're viewing more than one invoice, you'll be asked if you'd like to email the current invoice or the entire found set of invoices.

You'll also be asked if you'd like to send the invoice immediately or view it. Viewing an invoice lets you review the email message, add comments or add an attachment.

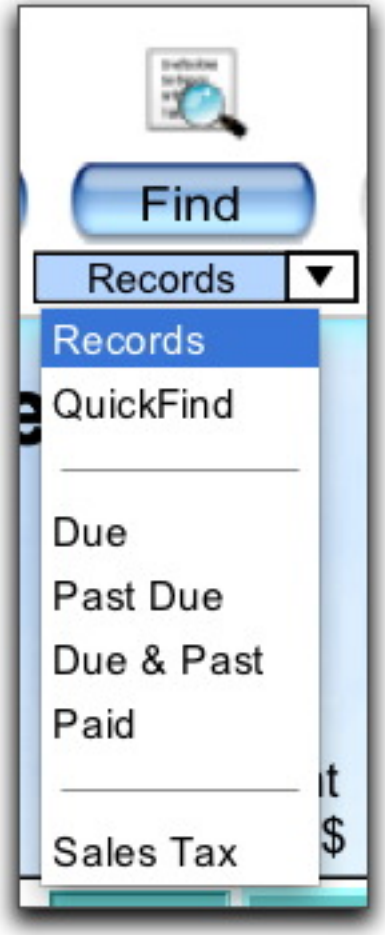
PDF Creation
There are two ways to create PDF files from the Studio Organizer.

Macintosh Users: Mac users have PDF capabilities built into their operating system. It is included in the Print dialog box. To create a PDF, print as you normally would but select Save as PDF from the PDF button/menu in the print driver software. This feature can be used with all of your software and is not limited to the Studio Organizer. Anything that can be printed can be saved as a PDF.

Network Users: If you have a full working copy of FileMaker Pro, you will be able to create PDF files of your invoices, statements and coupons. Go to the invoice Entry screen and click on the drop down menu below the Print button. Scroll to the bottom. Select an option from the Network Only options, then click the Print button. PDF files are saved to your Desktop.

Invoice Entry Find Options

On the Invoice Entry screen below the Find button is a drop down menu with these options: Records, Due, Past Due, Paid or Sales Tax.



Select **Records** from the drop down menu below the Find button and you can search the Invoice Entry screen by single clicking the Find button and entering your find criteria. Single click the Find button again to search your records.

Select **Due** and click the Find button and a Find Invoices screen appears which allows you select a range of dates and a variety of other find criteria. Use these fields sparingly at first, for example only enter a starting and ending date for your search. Click the Continue button and a found set of invoices will be created. Use the arrow buttons at the top of the screen to browse through the invoices.

Select **Past Due** and click the Find button and once again the Find Invoices screen will appear. You might want to leave the starting and ending dates blank for this search so you'll find all past due invoices.

Select **Due & Past Due** and click the Find button and now you'll be searching for both invoices which are due and those that are past due. Selecting starting and ending dates is recommended.

Select **Paid** and click the Find button and now you'll be searching for paid invoices. Selecting starting and ending dates is optional.

For all of these options you can create detailed reports for the found set of invoices. Make a selection from the drop down menu below the Print button or explore the Reports menu to find the right report.

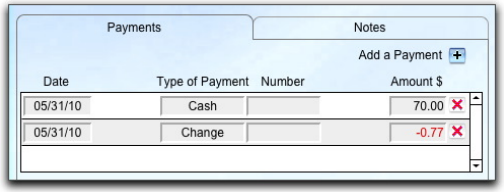
Select **Sales Tax** and click the Find button and now you'll be searching for paid invoices and you should select starting and ending dates. Click the Continue button and you'll be presented a Sale Tax report. Click the Preview button to see how the report will print.
Your printed output may be different than what you see on the screen.

Paying an Invoice

There are several ways to record an invoice payment:

the Add a Payment Button

To add a payment to an invoice, click the Add a Payment button on the Payments folder tab of the Invoice Entry screen.



The date defaults to today but it can be changed. Use the TAB key to move between the type of payment, check or account # and amount fields. Click Save and the payment will be recorded.

If change is due a dialog box will appear displaying the amount due.

Please be sure you do not enter credit card information or any sensitive data into the Number field when recording a payment. This field in not encrypted, and credit card numbers cannot be stored on personal computers. For more details about storing sensitive data, please see *the Vault* in the built in Help.

the Fast Pay Pick List

You can also add a payment to an invoice using the Fast Pay folder tab on the top right side of the Invoice Entry screen.

Click on an icon to select a payment option. Enter the payment details.

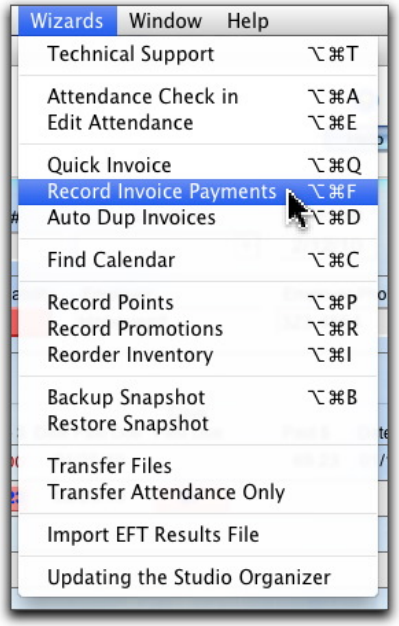
The date defaults to today but it can be changed. Use the TAB key to move between the type of payment, check or account # and amount fields. Click Save and the payment will be recorded.

If change is due a dialog box will appear displaying the amount due.

To change the items displayed on the Fast Pay folder tab, click the Edit List button and check all the forms of payment you accept. Uncheck those that do not apply.

the Record Invoice Payments Wizard

the Record Invoice Payments Wizard



When you've received a many payments, or perhaps your statement from your bank or payment processing service, you can quickly record them using the Record Invoice Payments Wizard.

To begin, go to the Wizards menu and select Record Invoice Payments. A Find Invoices screen will appear. Enter the starting and ending due dates of the invoices you wish to record, or leave both the starting and ending date fields empty to display all invoices with a balance due. Select Due or Due & Past from the drop down menu. Click Continue.

The Record Invoice Payments Wizard screen will appear. Click on the column headings to sort the list of invoices.

Check the blue box if a payment has been received. Click Check All to select all the invoices in the list, or Uncheck All to unselect all invoices. If the majority of invoices are being paid, click the Check All button, then uncheck those invoices that have not been paid.

The Date Paid defaults to today, and the Amount Paid defaults to the full amount due, but these fields can be edited. You can also select a method of payment and enter a check number.

To add a late fee, click the + button beside the Late Fee field. The late fee amount can be changed.

Click the Deposit Slip button to create a printout of all payments listed.

When you're ready to process the checked invoices as paid, single click the Record button.

To start the Record Invoice Payments Wizard again, click the Reset button.

To search for a particular invoice, click the Find button, enter what you're searching for into one of the fields, then click the Find button again.

Refunds, Store Credits & Running a Tab

If a student purchases an item then wishes to return it, you can either refund the student's money or issue a store credit.

Issuing a Refund

To do this go to the invoice you created when you sold this item to the student. Do not alter the original line items on the invoice. Instead create a new line item for the returned item and set the quantity to -1.
(Or -2 if the student is returning two of the same item.)
Do this for each item the student is returning. This will result in an overpaid invoice.
To issue the refund, go to the Fast Pay Pick List on the right side of the screen and click on the Cash button. This will display the amount of the refund and enter a Payment line item with the amount of the refund. Click the Print button to give the student a receipt and update inventory. After clicking the Print button, any returned items will be added back into inventory.

Issuing a Store Credit

Create a new empty invoice for the student to create a store credit voucher. Change the invoice title to *Credit*. Create a new line item for the returned item and set the quantity to -1. (Or -2 if the student is returning two of the same item.) Do this for each item the student is returning. This will result in an overpaid invoice. The next time a student purchases something, add the items to this credit invoice and the overpaid amount will decrease.

Date Paid

The Date Paid field on the Payments folder tab of the Invoice Entry screen is automatically entered and can only be indirectly modified. This field is automatically set to the date payment was recorded. If more than one payment is recorded, the earliest payment date is used. To modify the Date Paid field, change the date of the earliest payment.

Delete a Payment from an Invoice

To remove a payment from an invoice, click the red X to the right of the payment. Deletions are permanent and cannot be undone. The Amount Due will automatically update after a payment has been deleted.

Setting up a Student Tab

Sometimes kids don't have cash on them but need to purchase a drink or something from the pro shop. If you like, you can create an invoice and just keep adding to it each time the student purchases something. Then at the end of the month, you can print that invoice and present it to them for payment. Or, you could collect some money in advance -- just enter it as a payment -- and let the student purchase items until the balance goes to zero.

Making Sure You Get Paid

The fastest way to stay on top of your receivables is to create invoices for each and every payment you expect to receive using the Duplicate feature in Invoice Entry.

Creating these invoices creates a record of expected income.

Once you've created invoices containing your future revenue, use the Find button on the Invoice Entry screen to stay on top of your receivables. Find Due, Past Due, or both.

Once you've created a found set use the options under the Print button to print coupons, statements, invoices, or a report.

You can also create a variety of reports from the Reports menu. Just click the Reports button and select Finances from the Category drop down menu. Click on a Report name and a detailed description of the report will appear on the right. Click the Create It button to begin the report creation process.

Normally a Find Report dialog box will appear in which you can select a variety of find criteria for your report including starting and ending due dates, past due dates, and much more. Read the instructions on the right side of the screen for details.

Finally, be sure you know whether the Auto Dup Invoices Wizard will run automatically at start up or manually. You'll make this selection on the Invoices folder tab of the Preferences screen.

Credit Card Processing

Q: I would like to be able to charge a customers credit card directly from the Invoice Entry screen. Does the Studio Organizer integrate directly with any payment processing services?

A: The Studio Organizer does not integrate with any payment processing service. Instead, you can use any payment processing company you wish. Online payment processing companies are notoriously unreliable, so check with your personal banker. Pay Pal can also be used.

Payment Processing Options

In October 2008 the major credit card companies issued strict new guidelines that essentially outlaw storing credit card information on a personal computer. Therefore the Studio Organizer does not provide the option of storing credit card numbers. Also, you should not attempt to store credit card information in any fashion on your computer. Here are some suggestions for recurring charges, such as tuition:

Use a Billing Company
The Studio Organizer is designed to be used with any billing company, merchant account or banking service. You can export transaction data and fax or securely upload to any billing company you wish to use. This is discussed in detail in the built in Help under the Electronic Funds Transfers category. Please read *Submitting EFT Transactions*.
After payments have been processed, use the Record Invoice Payments Wizard to record payments.
If the billing company provides an EFT results file, this can be imported. Please read *Importing Eft Results File* in the built in Help.

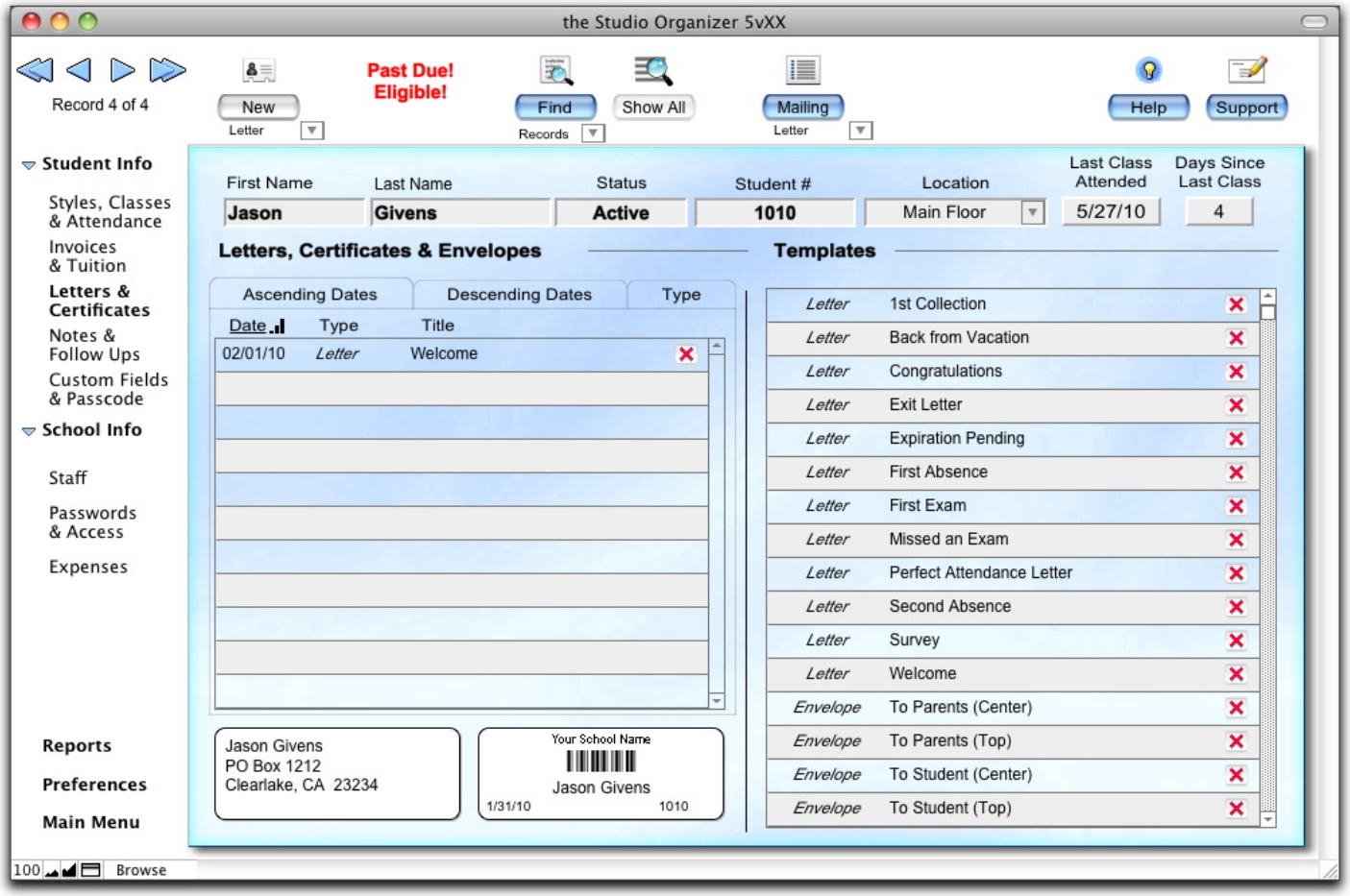
Bank Drafts
There are no restrictions on storing bank account information, and this information is encrypted when stored in the Vault.
Ask your bank representative for details about the paperwork and procedures for debiting your students bank accounts.
After payments have been processed, use the Record Invoice Payments Wizard to record payments.

Pay Pal Subscriptions
Visit www.paypal.com to create a Pay Pal business account and create *subscriptions* for each type of tuition plan you offer. For example, if you offer month to month tuition, you can create a monthly subscription payment that will be processed until it's canceled. Once you've created a subscription, you can create a button and add it to your web page. This will require a working knowledge of HTML and of course, a web site.

After you've created subscription buttons for all of your tuition plans, have each student subscribe to a payment plan. Students can pay using their credit card, debit card, bank account or Pay Pal account. The student creates their own Pay Pal account when enrolling in a subscription payment plan so you will not have access to any of their bank account or credit card information.
Pay Pal will automatically process each payment for you and notify you via email when a payment has been received. Use the Record Invoice Payments Wizard to record these payments. If a payment fails, you and the student will be notified via email and Pay Pal will try again in three days. They will make three attempts to process payment, then cancel the subscription and email you.

Letters & Certificates

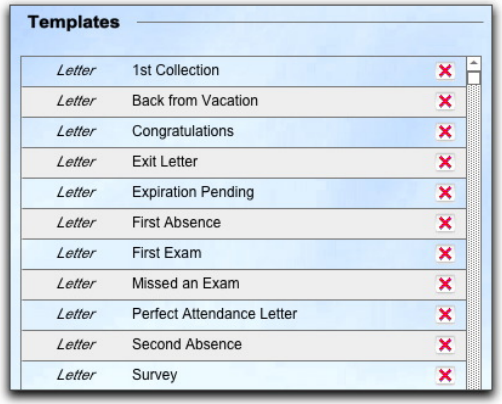
Envelopes
Mass Mailings



the Letters & Certificates screen

Creating a Template

Click on Letters & Certificates in the column on the left side of the screen. Take a look at the Templates column on the far right...



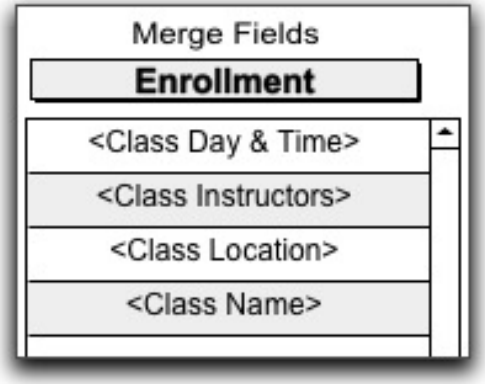
Templates are form letters, form certificates, and form envelopes. Templates use *merge fields* to insert a students name or information into a letter, certificate or envelope. The end result is you can create personalized documents for a group of students with very little effort.

For example, you could create a template which begins:

"Dear <First Name>" and each letter you create will insert the student's first name into the letter. If you've used any type of mail merge software, such as Microsoft Word, you'll understand how templates and merge fields work.

There are over a dozen sample templates in the Studio Organizer. You can scroll through the list on the right side of the Letters & Certificates screen. Consider these suggestions. You will most certainly want to create your own contracts, letters and certificates.

To create a template, set the drop down menu below the New button to Template, then click the New button. Or you can click directly on the Templates text under the student number.



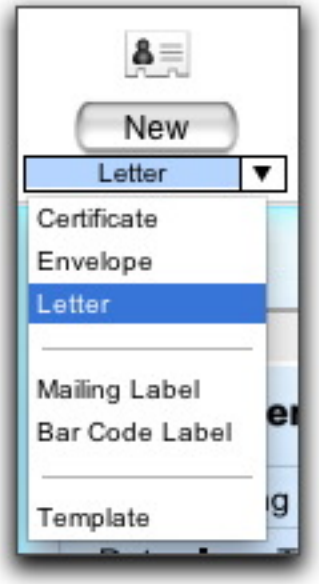
A blank page will appear. You can type in a name for this template, and select the default page layout which will be used every time this template is created. There are a variety of page layouts that can include your logo and place it in different locations. Feel free to experiment with different page layouts. You can change the page layout at any time.

You can now begin to type the text of your template.

Inserting a Merge Field

Use the Merge Field drop down menu to view the different categories of fields. To insert a merge field click and drag the field to into the text of the template. Release the mouse to insert the merge field in your text.

Letters, Certificates, Envelope & Merge Fields

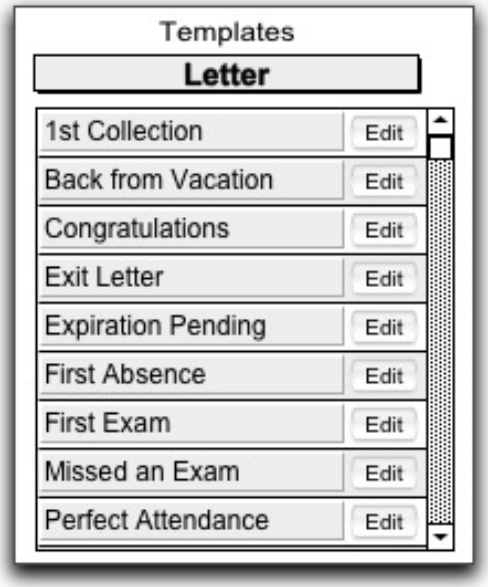


Creating a Letter, Certificate or Envelope
You can quickly create personalized letters, certificates and envelopes. *Merge fields* are used to insert a students unique information into these documents.

To create a new letter, certificate or envelope go to the Letters & Certificates screen and make a selection from the drop down menu below the New button in the upper left hand corner, then click the New button. A Wizard will appear that will walk you through creating the item.

Once your item has been created you can make any changes you wish before printing or emailing. Changes made here will not affect the original template.

To edit a template, click the Edit button to the right of the template name and make the desired changes. After editing a template, to apply those changes to the document you are currently viewing, single click on the template name again. A warning dialog box will appear. Click OK to remerge the document.



Viewing a Letter
You can view a letter, certificate or envelope that has already been created by single clicking it on the Letters & Certificates screen.

Deleting a Letter, Envelope or Certificate
Single click the red X to the right of the letter, certificate or envelope. (An Admin level password is required.)

Style of Instruction Merge Fields & Logos

Style of Instruction Merge Fields

In order to properly use the style of instruction merge fields, the Style of Instruction field on the letter or certificate *must* have the correct style selected. Otherwise, rank and attendance merge fields will not display properly.

You'll have the option of selecting a style of instruction when you click the New button on the Letters & Certificates screen. Selecting the style of instruction is one of the steps included in the Wizard, but it's optional. The style of instruction is selected automatically when certificates are created using the Promote button or Promotion Wizard.

Logos: Which One Gets Used?

If you've selected a page layout that displays a logo, either the school logo or the style logo will be displayed. If you've created a letter, certificate or envelope but have not selected a style of instruction, the school logo is used. If you have selected a style of instruction, you can select the school logo or the style logo. Go to the School Info screen, then click on the style of instruction you've selected for this letter or certificate. Click on the Style Preferences folder tab then make a selection from the drop down menu in the lower left corner under the Style logo.

Changing the Date

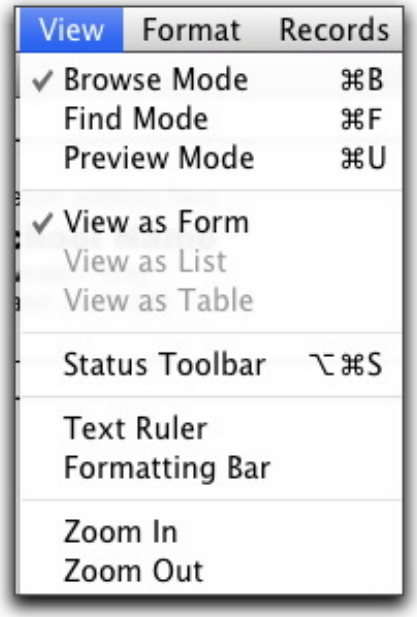
Most form letters and certificates use the <Current Date Text> merge field. This merge field inserts the date the letter or certificate was created. However, if you would like to create certificates or letters today, but have them dated in the future or the past, you can do this by replacing the <Current Date Text> merge field with the date of your choosing.

For example, if you have a test coming up next Friday and you would like to print promotion certificates today, here's what you'll do:
Go to the Letters & Certificates screen, and scroll through the templates column on the right until you see the Belt Promotion Certificate. Click on it to view it.
Change the <Current Date Text> to the date you wish to appear and now create your certificates. Once you're done, you be sure to go back to the Belt Promotions Certificate template and reinsert the <Current Date Text> merge field.

Certificate # Merge Field

The Certificate # merge field is a unique number you can add to your certificates.
These Certificate #'s are not sequential, but they are always unique.

Fonts, Alignment, Tabs & Indents



Changing the Font, Style, Size, etc.
In letters, certificates, envelopes and templates you can select any font you have installed on your computer, change the style, size and more. Changes made to your template will appear in the merged letter, certificate, envelope or template.

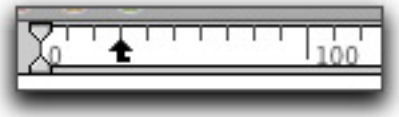
Highlight some text, then go to the Format menu to view your text formatting options. You can also show a text formatting menu bar at the top of the screen. To do this, go to the View menu at the top of the computer screen and select Formatting Bar. Only the text you have highlighted is changed.

Setting Margins, Indents and Tabs
In the group of buttons at the bottom right of the template, click the Ruler button to display the text ruler, then highlight some text. Only the text you have highlighted is affected.

Change the Left Margin: Move the bottom left arrow in the text ruler.

Change the Right Margin: Move the bottom right arrow in the text ruler.

Change the First Indent: Move the top left arrow in the text ruler.



Insert a Tab: Single click anywhere on the ruler to insert a small black tab arrow.
Click and drag a tab arrow to move it.
Double click a tab arrow to change the tab to left, right, centered or decimal tab.

In letters, certificates, envelopes and templates the TAB key will not take you to the next field. Instead it will insert a TAB space in the text you are typing.

Emailing a Letter

When you create a letter, you have the option of emailing it to the student.

How your computer handles email is determined by your email preference on the General folder tab of the Preferences screen and the email software you are using. The Studio Organizer does not send or received emails, it merely passes the information to your email software.

The Email button creates a text only version of your letter and hands it off to your email software for delivery. It requires a dedicated email application such as Windows Live Mail, Outlook, Entourage or Mail. It cannot be used with America Online or web based email such as Yahoo, gmail or Hotmail.

To email a letter click the Email button.

If you're viewing more than one letter, you'll be asked if you'd like to email just the current letter or the entire found set of letters.

You'll also be asked if you'd like to send the letter immediately or view it. Viewing a letter lets you review the message or add an attachment before the email is sent.

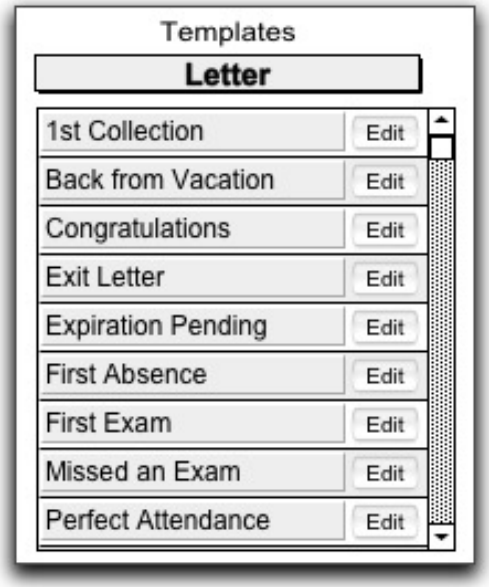
Emailed letters are stored in the Studio Organizer as well as your email software.

the Mailing Button & Mass Mailings

At the top of the Letters & Certificates screen is the Mailing button. Under this button is a drop down menu with these options:

Letter
Certificate
Envelope
-
Mailing Label
Bar Code Labels

Select one of the first three options to perform a mass mailing to the found set of students. Select Certificate, Envelope or Letter then click the Print button. A Wizard will appear that will walk you through the creation process. The letter, certificate or envelope you select in the Wizard will be created for each student in the found set. This is called a *mass mailing*.



Once your items have been created you can edit them individually. Any changes made to one item will not be applied to other items or the original template.

To edit a template, click the Edit button and make the desired changes. To apply those changes to an existing item, single click on the template name again. A warning dialog box will appear. Click OK to remerge the document.

If you select Mailing Label or Bar Code Label, labels for the entire found set of students will be created when you click the Mailing button.

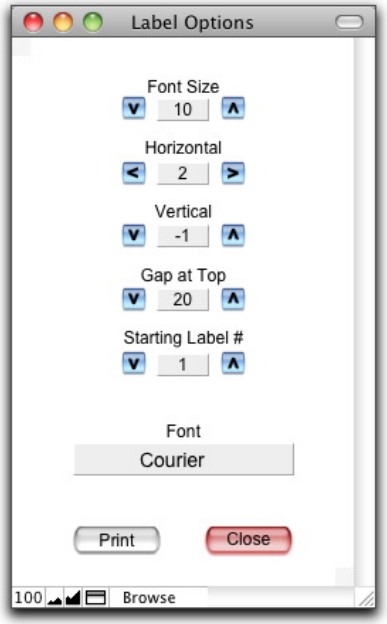
Mailing Labels & Bar Code Labels

To create mailing or bar code labels, go to the Letters & Certificates screen and click directly on the sample Address label or Bar Code label. The label image is actually a button. Or go to the Reports menu and select Labels from the drop down menu of categories.

To create labels for the found set of students, go to the Letters & Certificates screen, and select Mailing Labels or Bar Code Labels from the drop down menu below the Mailing button, then click the Mailing button.

Labels do not have to be printed right away. You can create any many as you like and print them later. When creating address or bar code labels from the Letters & Certificates screen, a warning message will appear if there are previously created labels. You can delete those labels to clear the labels module, or keep them and include them with the new labels being created. Labels print 30 per page: 10 down, 3 across. Print on plain white paper at first to determine the right settings for your printer.

You can change the font size for address and bar code labels. Click the horizontal and vertical nudge arrows to move the text so it aligns properly on the label. Experiment with different gaps at the top of the page. You can print labels on pages that have already been used by setting the Starting Label #.



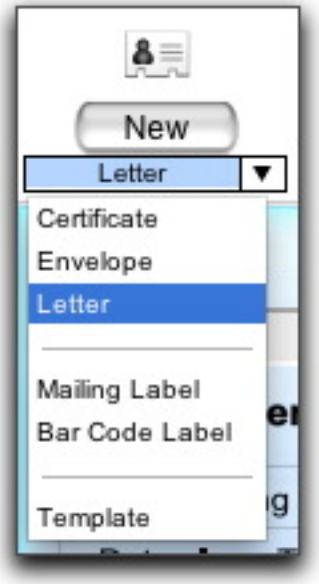
You can use any font installed on your computer. To view a list of the fonts installed on your computer right click (PC) or Control click (Mac) into the font field then select the Font menu. Make a note of the font you wish to use, then type the font name into the Font field.

Clicking the Print button displays a Preview of the labels and the print dialog box. After printing a dialog box will appear to confirm printing was successful. Click Yes and the labels module will be emptied and readied for the next batch of labels. Only labels are deleted. No student data is deleted. Do not clear the labels module if you wish to retain these labels and include them in the next group of labels to be printed.

To delete one or all labels click the red X or select Delete All Labels from the Scripts menu at the top of the screen. This does not delete any student records, only labels are deleted.

Click the Close button to close the labels windows without deleting any labels.

Label Page Size & Creating a Certificate



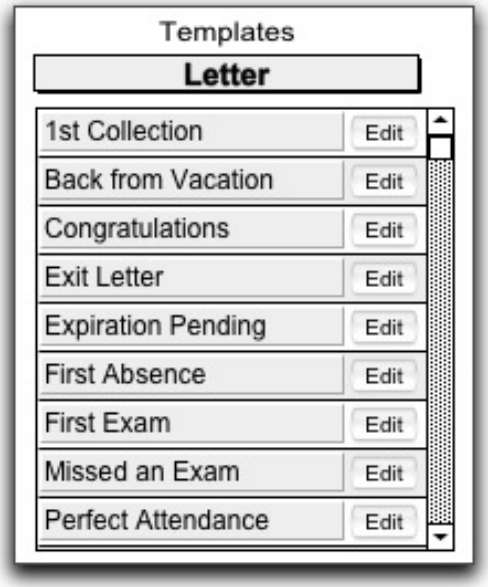
A4 or US Letter Page Size for Labels?
The Letter Size you have selected on the Settings folder tab of the School Info screen is used when creating mailing or bar code labels.

If you have US Letter selected, the labels page will be formatted for 30 labels on a 8.5" x 11" sheet.

If you have A4 selected, the labels page will be formatted for 30 labels on a 210 × 297 millimeter (8.27" x 11.69") sheet.

Some printers may not print the last row of labels because it's too close to the edge of the paper.

Creating One Promotion Certificate
To create a single promotion certificate for a student, go to the Letters & Certificates screen and set the drop down menu below the New button to Certificates, then click the New button.



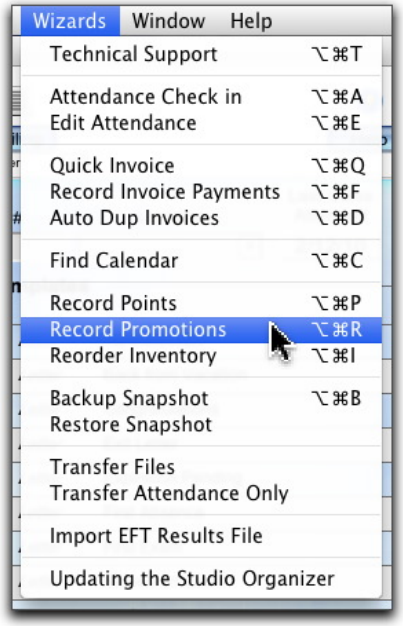
A Wizard will appear that will walk you through the certificate creation process. When creating promotion certificates, or any template using merge fields pertaining to a style of instruction, you must select a Style of Instruction on the second Wizard screen.

Once your certificate has been created, you can edit it. Changes made will not be applied to the original template.

To edit a template, click the Edit button and make the desired changes. To apply those changes to an existing item, single click on the template name again. A warning dialog box will appear. Click OK to remerge the document.

You can view a certificate on the Letters & Certificates screen by single clicking it.

Creating Many Promotion Certificates



You can create promotion certificates for your students before they are promoted so the certificates will be available after the test has been completed. Or you can print the certificates after the test when you record the promotions.

Using the Test List to Print Certificates Before a Test
Go to the Wizards menu and select Promotions, or go to the Styles, Classes & Attendance screen and select Test List from the drop down menu below the Promote button then click the Promote button.

A find screen will appear. You can select the status of the students you wish to find, as well as other fields. By default the eligibility field is set to find both eligible and almost eligible students. (You may want to change this field to eligible.) After making your selections click the Continue button. Your test list is now displayed.

Click the Create Certificates button to create a certificate for the upcoming rank each student is about to test for. For example a white belt testing for his yellow belt will have a yellow belt certificate created. A found set of all promotion certificates created today will be displayed for you to print.

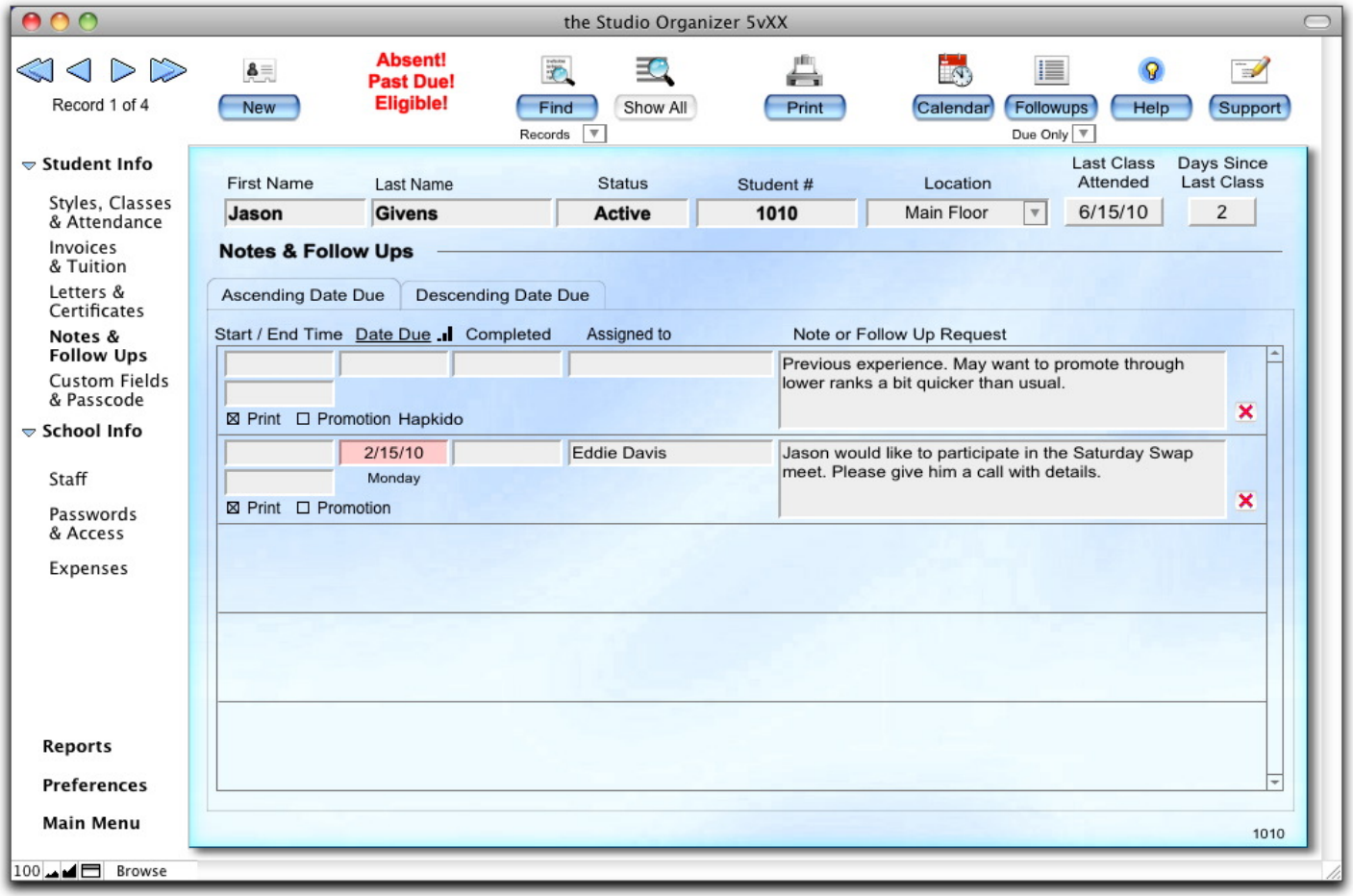
Using the Promotions Wizard to Print Certificates After a Test
Go to the Wizards menu and select Promotions or go to the Styles, Classes & Attendance screen and select Promote from the drop down menu below the Promote button, then click the Promote button.

A Find screen will appear. You can select the status of the students you wish to find, as well as other fields. By default the eligibility field is set to find both eligible and almost eligible students. (You may want to change this field to eligible.) After making your selections click the Continue button.

The Promotion Wizard is now displayed. Check the box next to each student you wish to promote. Click Check All to select all students listed, or Uncheck All to unselect all students listed. If the majority of students are being promoted, click the Check All button, then uncheck those students who will not be promoted.

Click the Record button. Each student you've checked will be promoted, then you'll be asked if you would like to create certificates. If you click Yes all certificates created today will be displayed for you to print.

Notes & Follow Ups



The Notes & Follow Ups screen

Creating a Note or Follow up

Notes and follow ups are almost the same thing; a follow up has a *date due*, a note does not. A follow up is normally assigned to a staff member. Notes generally are not.

To create a note or follow up single click the New button in the top left corner of the Notes & Follow Ups screen. Use the TAB key to move through the fields.

Enter a date due, or leave this blank if this note requires no follow up. Enter a start and end time if desired, otherwise leave any unwanted fields blank. Click the red X to clear a field.

Select the style of instruction. Any notes with a style of instruction selected will appear on the Style Details screen of that student.

If this note records a promotion, check the Promotion check box and be sure a style of instruction has been selected.

You can assign this note to a staff member. The Assigned To drop down list is populated with the names of staff members that have their own password. (Be sure to create a password for each staff member.) Any notes with a staffers name in the Assigned To field will appear on their Staff screen in the Notes & Follow Ups folder tab.

Click the Print check box if you wish to include this item in printouts, reports or the calendar.

Click the Save & Add Another button to create another note, or click Save & Close.

To print notes or follow ups click the Print button. Only items with the Print box checked will be included.

Click the Calendar button to view the student or staffers calendar.

Start & End Time
When creating a note, entering the start and end Time is optional.
Click the down arrow on the right side of these fields to display a drop down list of previous entries. If you have not made any entries into a field, the drop down list will be empty.

Calendars

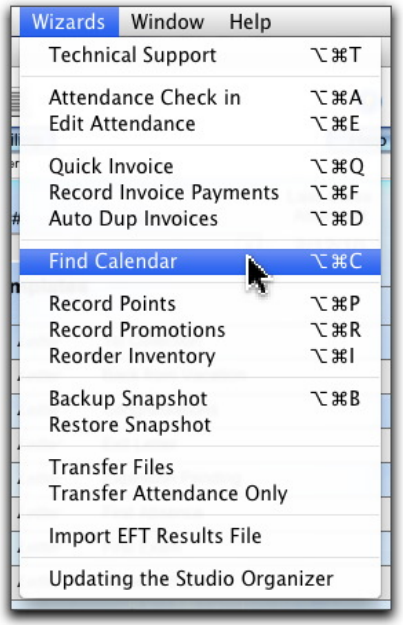
A calendar is automatically created for each student. To view a student's calendar, go to the Notes & Follow Ups screen and click the Calendar button in the top middle of the screen.

To add to a calendar, create a note. Select a staff member from the Assigned To drop down list if you wish to include this note on a staff members calendar.

Entering a start and end time is optional.

When a new note or follow up is created, the Print check box is automatically checked. Uncheck the Print box if you do not wish to include this note on reports or calendars. Also be sure to enter a due date.

Only notes with a due date and the Print box checked are displayed on the calendar. Space on the monthly calendar is limited, so be sure to review the calendar to see how much text will print.



the Calendar Button

Click the Calendar button at the top of the Notes & Follow Ups screen to view a monthly calendar of the current students notes. Calendar entries can be edited by clicking on them, then editing the note.

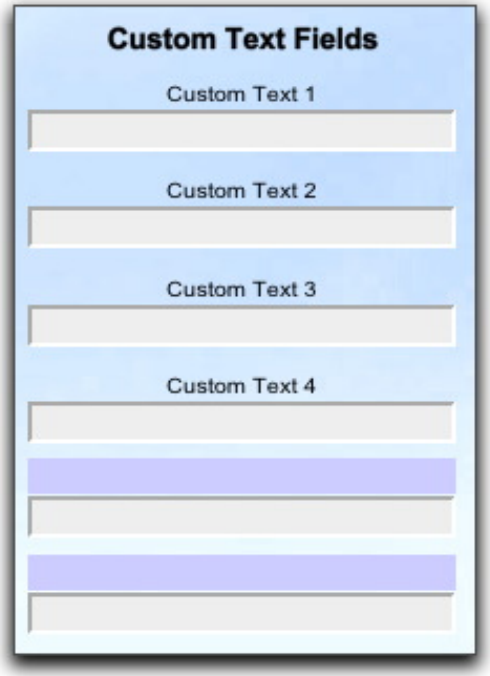
To quickly jump to a calendar, click the Calendar button at the top of the Notes & Follow Ups screen, or click the Find Calendar button on the Main Menu, or select Find Calendar from the Wizards menu at the top of the screen.

For fastest viewing, make note of the keyboard shortcut displayed on the Wizards menu.

Custom Fields

Would like to record the last tournament or seminar your students have attended? Or an association number? It's very likely there's a unique bit of information you need to record, but there isn't an appropriate field in the Studio Organizer. Custom fields are the solution.

There are six custom text fields, six custom date fields, and six custom file fields. Above each custom field is a smaller field which can be used as a label. It's light purple if it's empty. Once a label field has text entered into it, the light purple background goes away and the text you've entered as a label will appear in every record. (This is called a *global* field.)



The six custom file fields on the right can be used in two ways; store a link to a file, or store the file. When you click into an empty custom file field an Open dialog box appears. Select a file, then check *Store only a reference to the file* at the bottom of the dialog box if you wish to store only a *link* to the file. This does not store the file itself, only a link to the file's location on your hard drive. This is the recommended option, since it will keep your Studio Organizer data file much smaller.

Uncheck the *Store only a reference to the file* check box if you wish to save the entire file inside the Studio Organizer data file. The file does not have to remain on your hard drive after it's been stored in this fashion. Use caution with this option. Although it's convenient, storing files will increase the size of your Studio Organizer data file. Too many files, especially large ones, are known to cause corruption.

Once you have a file linked or stored in a custom file field, to retrieve that file, click on the field and a Save dialog box will appear. Select a name and location then click the Save button.

To clear a custom file field click the red X to the right of the field.

To print your custom field data, click the Print button. Or go to the Reports menu, select Student Info from the list of categories, then select Custom Fields. You can also select *View As Table* from the View menu to see the custom fields in a spreadsheet format that is somewhat modifiable. See *Customizing A Spreadsheet Style Report* in the built in Help.

the Custom Fields & Passcode Screen

Rating
Using the Rating field at the top of the Notes & Follow Ups screen is optional. Select A, B, C or D.

Previous Training & Medical History
The Previous Training and Medical History fields are optional.

Passcodes
Did a student forget their ID card? Your students can check in by typing their *passcode*.

To create a passcode, go to the Custom Fields & Passcode screen, click into the Passcode field and enter a unique passcode. Each passcode must be unique and at least four characters long.

Passcodes and Student #'s are not displayed in the attendance check in dialog box during check in. Instead bullets are displayed.

Passcodes can also be requested from adults picking up kids after class. Just tell parents their child will only be released to someone who knows the correct passcode.

If the Passcode field is not empty, as a security precaution only bullets will be displayed. To display a passcode, click into the field and enter your password. A Staff or Admin password with passcode access is required to view or edit a passcode.

Buttons on the Notes & Follow Ups Screen

Calendar Button
Click the Calendar button at the top of the Notes & Follow Ups screen to view a monthly calendar of the current students notes. Calendar entries can be edited by clicking on them, then editing the note.

To quickly jump to a calendar, click the Calendar button at the top of the Notes & Follow Ups screen, or click the Find Calendar button on the Main Menu, or select Find Calendar from the Wizards menu at the top of the screen.

For fastest viewing, make note of the keyboard shortcut displayed on the Wizards menu.

Creating a Calendar for a Room
Would you like to create a scheduling calendar for a room? Just go to the Staff screen and create a new record. Instead of entering a person's name, enter the name of the room in the name fields.

You can now create a calendar for this room and add notes to the calendar. Be sure to include a due date, and check the Print check box so each note displays in the calendar.

You can also schedule appointments for individual students using the calendar created for this room. To do this, select the room name in the Assigned To field when creating a follow up for a student.

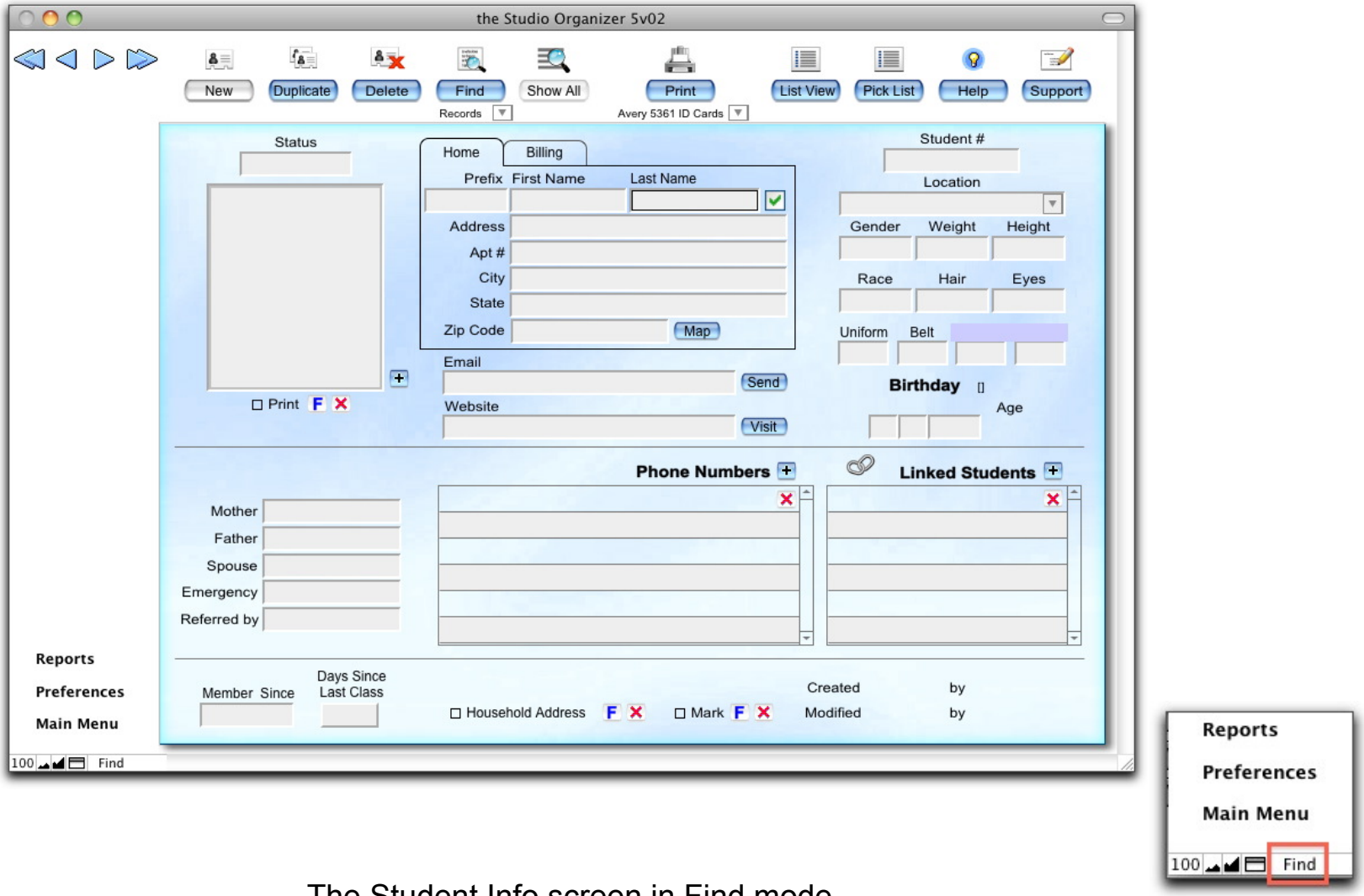
the Follow Up Button
At the top of the Notes & Follow Ups screen is the Follow Ups button with a drop down menu below it. Select Due Only then click the Follow Ups button to view all of your unfinished follow ups.
A follow up is considered uncompleted until a date completed is entered.

Select Search from the drop down menu below the Follow Ups button, then click the Follow Ups button. A find screen will appear. Enter your find criteria, for example you could select a staff members name from the drop down list, then click the Continue button.

To print follow ups click the Print button on the Notes & Follow Ups screen. You can also click the Print button on the Follow Ups screen. Only items with the Print box checked are included in printouts and calendars.

Finding Records

Replace, Sort, Spell Check



The Student Info screen in Find mode

Notice all fields are blank and the buttons on the left have disappeared.

Finding Records

Some database systems use the word *query* but we'll use the term *find* when referring to searching your records.

QuickFind
The QuickFind feature searches all fields at once. Select "QuickFind" from the drop down menu below the Find button and search ALL data fields with one mouse click.

the Find Button
First, be sure to set the drop down menu under the Find button to Records then single click the Find button. You are now in find mode, and you'll notice all the fields appear blank and the screen names on the left have disappeared. This reminds you you're in find mode.

Click into any field and type what you'd like to search for. This is called your *find criteria*. For example, click into the last name field and type Smith. Your find criteria is last name = Smith. To perform the find, single click the Find button again. To exit without performing a find, select Browse Mode from the View menu at the top of the screen, or click the find button again. Do not remain in find mode, otherwise you could mistakenly begin to enter more records. Anything you type while in find mode is not saved.

The Found Set
After successfully performing a find, you create a *found set* which contains all of the records matching your find criteria. After performing a find, take a look at the text under the arrows in the top left corner of the screen; the number of found records is now displayed. This is called the found set. Think of all of the records in your database as a complete deck of cards, and the cards in your hand as the found set.
Once you have created a found set, you can only browse the records in the found set. When you're playing cards, you can only see the cards in your hand. Once you have a found set of records, you can now create emails, do a mass mailing, print envelopes etc. Click the Show All button to undo the found set and browse all records. Think of this as picking up the entire deck of cards and viewing all of them. Also, you should know that when you perform a find, you're searching all records, not just your found set.

Using a Pick List to Find a Student
Another way to quickly jump to a student is to single click the Pick List button, then single click on the students name. No found set is created when using the Pick List button.

Find Matching Records
Here's a useful tip for searching for data in fields. Click into a field and highlight some text. This becomes your find criteria. Next, right click (PC) or Control click (Mac) and select Find Matching Records from the contextual menu that appears. This will find all records that match the find criteria in the field you've selected and create a found set.

Find Options on the Student Info Screen

Below the Find button on the Student Info screen is a drop down menu with these options: Records, Absentees, Past Due, Expiring or Eligible. Select **Records** from the drop down menu below the Find button and you can search the Studio Organizer by clicking the Find button then clicking into a field and entering your find criteria.

QuickFind will search ALL data fields with one mouse click.

Absent will appear in red letters below the student photo on the Student Info screen for any student who is has not attended a class in the number of days you have specified. (See the Defaults folder tab of the Preferences screen to determine which students are flagged as Absent.) With **Absentees** selected, single click the Find button. Click the Screen button to view your Absentees as a found set on the Student Info screen. Click the Report button to display a find options screen. You can change the find criteria on this screen, then click Continue to create a report of students who have not attended a class in the number of days you've specified.

Past Due will appear in red letters below the student photo on the Student Info screen for any student who is past due. Select **Past Due** from the drop down menu below the Find button and click the Find button to display a found set of all students who have at least one invoice past due. You can also create a Past Due report by going to the Reports screen and selecting Finances from the drop down list of categories.

Expired or *Almost Expired* will appear in red letters below the student photo on the Student Info screen for any student who has expired, or is about to expire. Select **Expiring** from the drop down menu below the Find button and click the Find button to display a found set all students who have a style of instruction that has expired or is about to expire. You can also create an Expiration report by going to the Reports screen and selecting Retention from the drop down list of categories.

Eligible or *Almost Eligible* will appear in red letters below the student photo on the Student Info screen for any student who is eligible or almost eligible for testing or promotion in any style of instruction. Select **Eligible** from the drop down menu below the Find button and click the Find button to display a found set all students who have a style of instruction in which they are eligible or almost eligible. You can also create a Test List by going to the Reports screen and selecting Promotions from the drop down list of categories.

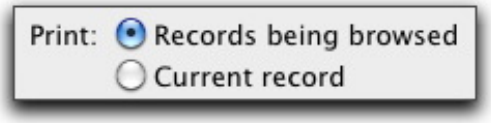
Printing the Found Set

IMPORTANT!
This is a something you'll want to be sure everyone who will be using the Studio Organizer understands.
This is a very common tech support question, so please read this information carefully.

Once you have successfully performed a find, you now have a *Found Set*.
Understanding the found set is very important when it's time to print. There are two options in your print dialog box:

Records Being Browsed
Select this option to print the entire found set.
If you have not performed a find and do not have a found set, all records will be printed.

Current Record
Select this option to print only the *one* record you're looking at when viewing a form, or if you're viewing a list or report, the current record is the one with the black bar on the far left side.



Invoices are the Exception
Always select *Records Being Browsed* when printing invoices.

Macintosh Users
In order to see the *Records Being Browsed* or *Current Record* option it may be necessary to select the Studio Organizer or FileMaker Pro from a drop down menu in your print driver software.

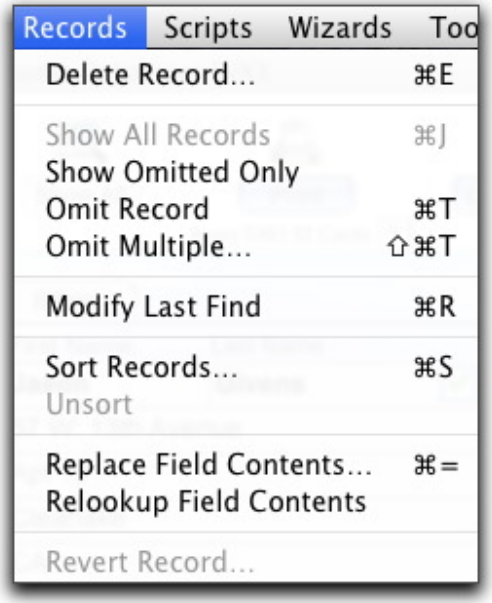
the Preview Button
Many reports and screens have a Preview button. Click this button to see how the report or screen will print. This is important because some reports will print slightly differently than what you are seeing on the screen. This is especially true if a report has a variety of sorting options, or subtotals by category, class, date, etc.
Try different sorting options then click the Preview button to see how report will print.

Finding Tips and Tricks

Once you've performed a search and have a found set, you can manipulate that found set.

Modify Last Find
Modify Last Find under the Records menu will return you to search mode and restore your last find request (s).

This will save you a few keystrokes when you want to try a different variation of your last search.



Omitting Records
Once you've performed a search, you can browse through the records and remove any records you do not wish to have in the found set.

Select Omit Record from the Records menu at the top of the screen.

If you are viewing a list, select the record by clicking on it, then select Omit Record from the Records menu.

Omitting does not delete the record, instead the record is removed from the found set. If you're playing cards, the cards in your hand are the found set. If you remove a card from your hand and place it back in the deck, you're *omitting* that card from the found set. The card isn't destroyed, it's just not in your hand or found set any longer.

Reversing the Found Set
The Show Omitted Only command under the Records menu reverses the found set.

All records the records you are not browsing become the found set, and the records that were in the found set are now omitted.

More Finding Tips and Tricks

Finding Empty Fields
The equal sign is a wild card that can be used to search for empty fields. To find records that have an empty field, type an equal sign (=) into the field while in find mode and perform the search.

For example: To find all records that do not have an email address entered, single click the Find button and type an equal sign into the Email field. Single click the Find button again, and only records which have an empty email field will be included in the found set.

The Asterisk Wild Card
You can use the asterisk (*) as a wild card to search for any value. Asterisks are place holders for any number of characters or digits.

For example, to find the entire month of February 2010 you could search your records for: `2/*/2010`
Or try: `Sand*` to find both Sandi and Sandy.

Finding Not Empty Fields using Wild cards
You can use the asterisk (*) as a wild card a placeholder for any value.

For example, let's say you want to find every record that has an email address. To find student records that have *any* text entered into the Email field (not empty), enter Find mode and type an asterisk (*) into the Email field then click the Find button again. Now any records with any text in the email field (not empty) will be included in the found set.

Bypassing Special Characters
Since the @ symbol is a special character, it's not possible to search your records for an email address, unless you insert a forward slash (\) before the @ symbol and punctuation marks.

For example, you'd type: `yourname\@email\.com` into the email field while in Find mode. You can also enter `yourname*` while in Find mode.

More Finding Tips and Tricks

Find Symbols

< less than
<= less than or equal to
> greater than
>= greater than or equal to
= exact match of whole words
== exact match of text
" " literal text, punctuation or non-alphanumeric characters
... range
! duplicates
// today's date
? invalid date or time
@ one character
# one digit
* zero or more characters

Finding a Range of Dates or Numbers

To find a range of numbers or dates, enter the first number or date, then three periods, then the last number or date.

For example:
`12/1/2010...12/31/2010` will find all of December 2010 and `100...500` will find 100 through 500.

Finding by Day Name

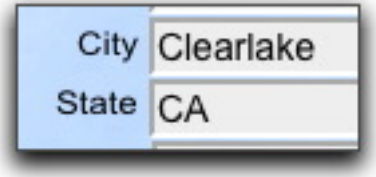
You can search date fields using the name of the day. To do this, click into a date field while in find mode and type a day name, or the first three letters of the day name.

For example, you could search a date field for `Mon` or `Monday` to find all the dates that fall on a Monday. Or, you could enter `Mon...Fri` into a date field to find all the dates that fall on a weekday.

Multiple Finds

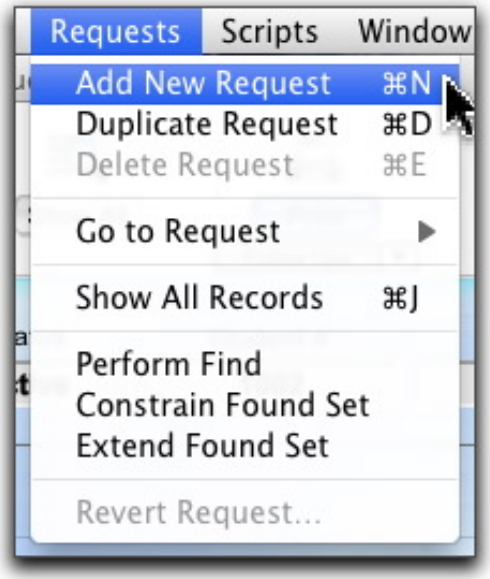
Multiple Fields in a Single Request
When you search your records, you can enter find criteria into multiple fields.

For example, a search for the city of Hollywood will create a found set of all residents of Hollywood, CA as well as Hollywood, FL. However, if you enter Hollywood in the city field and CA in the state field, your found set will only display Hollywood, CA residents.



You can even enter your find criteria into fields that are on different screens. This can be extremely powerful.

Multiple Find Requests
You can search your records for completely unrelated items by creating *multiple find requests*. Start by clicking the Find button and entering your first find criteria. When you are in rind mode, the Records menu at the top of the screen becomes the Requests menu. To enter your second find criteria, go to the Requests menu and select Add New Request or Duplicate Request. This creates a new, blank find request screen. Create as many find requests as you wish. Use can use the arrow buttons in the top left corner of the screen to review the find requests. Click the find button to search for any records that meet all of your find requests.



Let's say you'd like to search for students who live in the town of Clearlake, as well as the town of Bellview. Your database contains 12 students in Clearlake and 18 students in Bellview.

Click the Find button and enter Clearlake in the City or Town field. Next, select Add New Request from the Requests menu. Enter Bellview in the City or Town field of the second find request screen. Use the arrow buttons at the top of the screen to review your find requests the same way you browse records.

Single click the Find button to search your records. This will search the entire database for students in Clearlake (12) *and* Bellview (18). The found set will be 30 records.

Remember, you can even enter your find criteria into fields that are on different screens.

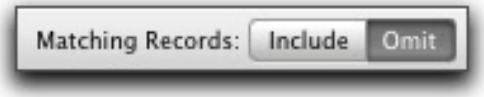
Omit Requests

Once you know how to search your recording using multiple find requests, you can choose to exclude any data you wish from a found set by clicking the Omit button.

The Omit check box is displayed on the *status toolbar* of the Studio Organizer. The status toolbar is normally hidden. To view the status toolbar, go to the View Menu and select status toolbar, or single click the status toolbar button in the bottom left corner of the screen, under the Main Menu button. The status toolbar button looks like two stacked rectangles, one dark, one white. Click it and the status toolbar will display at the top of the window. It includes a book icon for reviewing your find requests, the Omit check box we'll discuss here, and the Symbols drop down menu which contains the find symbols explained in the *Find Symbols* Help note.

To omit (exclude) data from a Find, start by clicking the Find button and entering your first find criteria. Next, go to the Requests menu and select Add New Request or Duplicate Request to create a new, blank find request screen. Single click the status toolbar button and click the Omit button. You can now enter the data you wish to omit or exclude into this second find request.

Here's an example: let's say you'd like to search your records for students who live in the town of Evansville *except* those in the 88099 Zip Code. Evansville has many Zip Codes, so without the Omit check box this would be difficult. Single click the Find button and enter `Evansville` in the City or Town field. Next, select Add New Request from the Requests menu. Enter `88099` into the Zip Code field of the second Find Request screen. Now click the status toolbar button in the bottom left corner of the screen to display the status toolbar at the top of the screen. Next, *single click* the Omit button in the status toolbar. Use the book icon or the arrow buttons at the top of the screen to review your find requests the same way you browse records.

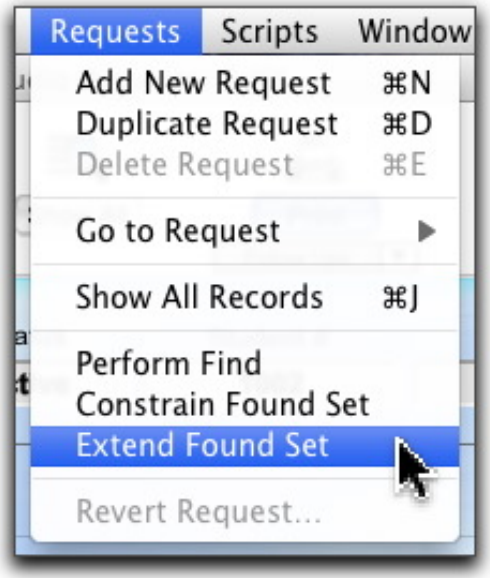


Click the Find button to search your records. This will search the entire database for all students in Clearlake, but *will not include* any students in the 88099 Zip Code in the found set. So if you had 100 students in Evansville, and 18 of them are in the 88099 Zip Code, the found set will be 82 records.

Omitting records is extremely powerful, and this feature can be used even if you have only one find request. For example, to search for every student who does *not* live in Evansville, you could click the Find button, enter Evansville in the City or Town field, display the status toolbar, click the Omit button, then click the Find button to perform the search. (Whew!) This will create a found set of all records that *do not have* Evansville entered into the town or city field.

Extending the Found Set

If you search your records and realize there are additional records you'd like to include in this found set, you can *extend* the found set. This is very similar to using multiple find requests, but the advantage is you can use this command *after* you've performed a search and realized you want to include even more records in your found set.



To extend a found set you must have performed a search and created a found set.

Next, click the Find button and enter your new find criteria. While in find mode the Records menu at the top of the screen becomes the Requests menu. To perform an extended search go to the Requests menu and select Extend Found Set.

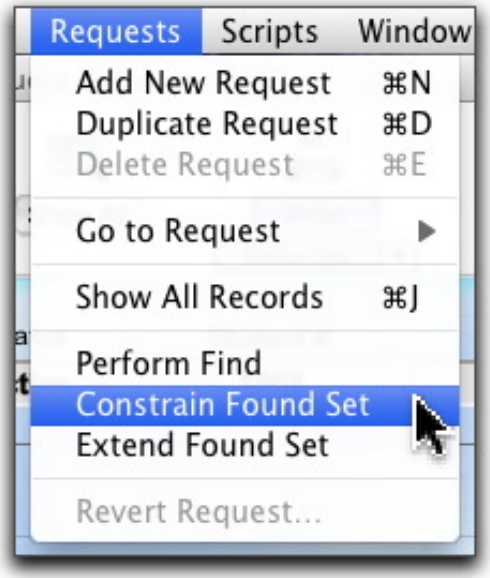
This will retain your original found set and add it to any records which meet the find criteria you've just entered.

Here's an example: let's say you've performed a search for all students who have brown hair, and your found set is 27 records. You'd like to include students who have black hair as well. You know there are 33 students with black hair.

With your current found set of 27 brown haired students still displayed, click the Find button and enter "black" in the Hair field. Next, select Extend Found Set from the Requests menu. This will search the entire database for students with black hair (33), and *add* them to the current found set of students with brown hair (27). The found set will be 60 records.

Reducing a Found Set

If you search your records and realize there are too many records, you can reduce the found set. This is similar to omitting records, but the advantage is you can use this command *after* you've performed a search and realized you'd like to perform a more specific search.



To reduce a found set you must have performed a search and created a found set.

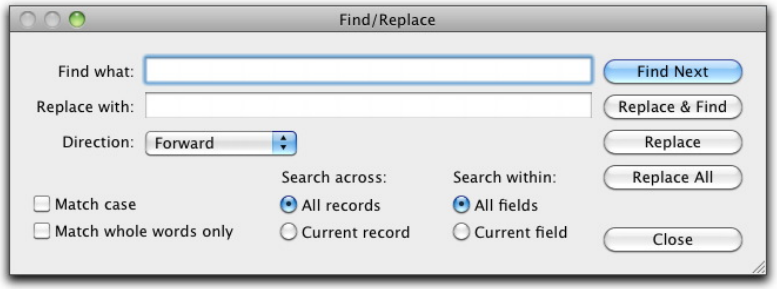
Next, click the Find button and enter the find criteria. When you are in find mode, the Records menu at the top of the screen becomes the Requests menu. Instead of clicking the Find button again as you normally would, you'll go to the Requests menu and select Constrain Found Set.

This will search *only* your original found set and display those records which meet the *second* find criteria request.

For example, performing a Find for `male` students returns 63 records. But you realize you'd like to only view the men who are 18 or older. There are 37 of them in your database.

With your current found set of 63 male students still displayed, click the Find button and enter `>17` in the Age field. Next, select Constrain Found Set from the Requests menu. This will search *only* the found set of 63 records, then display *only* those men who are 18 or older. The found set will be 37 records.

Find / Replace Menu Command



The Find / Replace command allows you to search for one word or phrase and replace it with something entirely different. For example, if you wanted to change the word "picnic" to "banquet" in a notes field, you don't have to do this manually. This command also will highlight text so it can be found in large blocks of text.

The Find / Replace command is under the Edit menu in the menu bar at the top of the computer screen. (This command may not be available on screens that have limited menus.) A found set of records is *not* created by this command. Instead your actions are performed within the current record or the found set of records. There are a number of things you can do with this command.

Find & Highlight
To search for a string of text, enter your find criteria in the Find What field and leave the Replace With field empty. Click the Find Next button and the first occurrence of your search text will be highlighted. Click Find Next to search for the next occurrence.

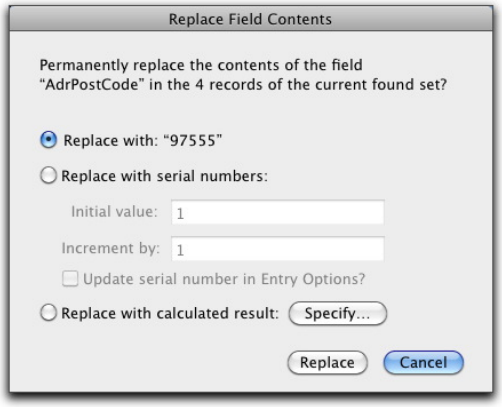
Find & Replace
In the Find What field enter your find criteria. In the Replace With field enter the replacement data.

Click **Find Next** to search for and select the next occurrence of the Find What data.
Click **Replace & Find** and if there is text that matches the Find What text, replace it with the Replace With text. Then search for and select the next occurrence of the Find What data.
Click **Replace** to replace the highlighted text with the Replace With text.
Click **Replace All** to replace all occurrences of the Find What text with the Replace With text.

For more information about the Find / Replace command, please see the built in Help.

Replacing Data

Replace Field Contents
Do you need to quickly make the same correction to many records? The Replace Field Contents command is under the Records menu. Power users love this feature. It's very similar to the Find and Replace command. The difference is this command is used to replace the *entire contents* of a field within a found set.


Replace Field Contents
Permanently replace the contents of the field "AdrPostCode" in the 4 records of the current found set?
Replace with: "97555"
Replace with serial numbers:
Initial value: 1
Increment by: 1
Update serial number in Entry Options?
Replace with calculated result:
Specify...
Replace
Cancel

For example, let's say a Zip Code has been changed from 80980 to 97555. You have 4 students in the old Zip Code. Rather than have to change 4 records individually, the Replace Field Contents command lets you do this very quickly and easily. To use this powerful command, you'll first perform a find and create a found set.

Using our example, you would perform a find for the old 80980 Zip Code. This will create a found set of 4 records. Next edit the field you would like to change. For example, enter the new 97555 Zip Code. With the cursor still blinking in the field you have just edited, select Replace Field Contents from the Records menu.

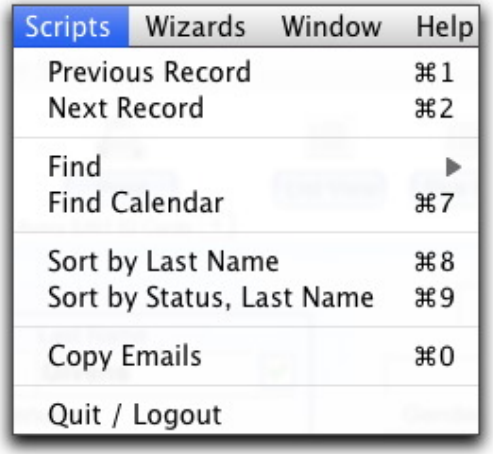
Read the text at the top of the Replace Field Contents dialog box. This change will be permanent. There are 4 records in the current found set that will be changed.
Click the top radio button. Click the Replace button.

You can use this command in any field you can edit. Password restrictions apply. Also, the Replace Field Contents command modifies the *entire* found set. If you were to search your records and create a found set of 30, the Replace Field Contents command would be performed on all 30 records.

Important! This command cannot be undone. If in doubt run the Backup Snapshot Wizard first.

Replace Buttons
To quickly change many records, use the Replace button. It's a green check mark. You'll find these buttons on a variety of screens. Click the Replace button beside a field to apply the current setting to all records in the found set. Search your records to create a found set or click the Show All button to modify all records. Changes made using the Replace button cannot be undone. Use the Replace buttons with caution. If in doubt, run the Backup Snapshot Wizard first.

Sorting Records

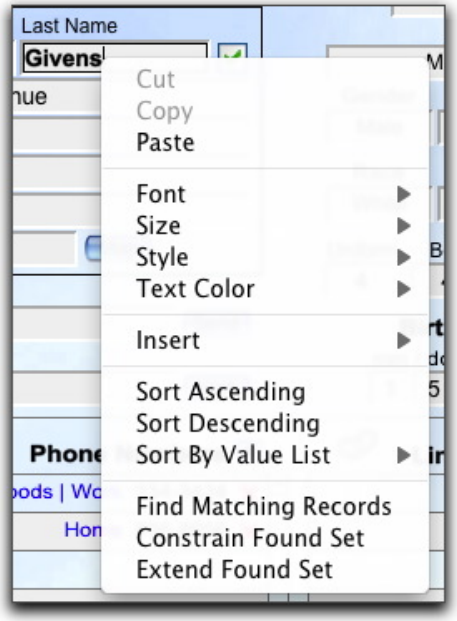


As you create records they are stored in the order they were created. To change that order, you can *sort* them.

First a quick vocabulary lesson...
Any time you wish to rearrange the order of records in the Studio Organizer, for example, display all of your students in alphabetical order, you'll *sort* those records. Sorting is only performed only on the found set of records.

Any time you search for particular records, you'll perform a *find*. Some computer software uses the term *query*.

Under the Scripts menu at the top of the screen you'll find several find and sort scripts. Just select them from the Scripts menu to use them. Make a note of the keyboard shortcuts.



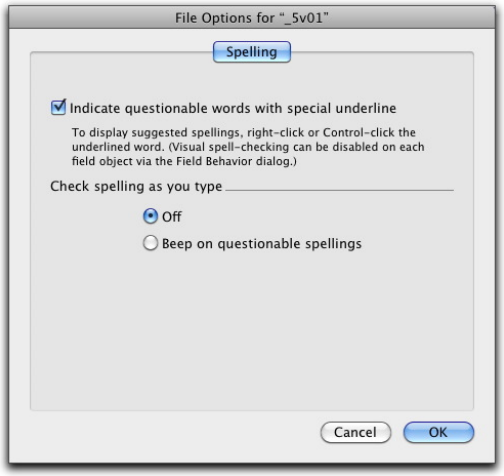
You can also sort on any field in the Studio Organizer. To do so, right click (PC) or Control click (Mac) directly on the field you wish to sort by then select a Sort option from the menu that appears.

Sort Ascending
Sorts A to Z, 1 to 10

Sort Descending
Sorts Z to A, 10 to 1

For example, to sort your student's by Student # right click (PC) or Control click (Mac) on the Student # field and select Sort Ascending.

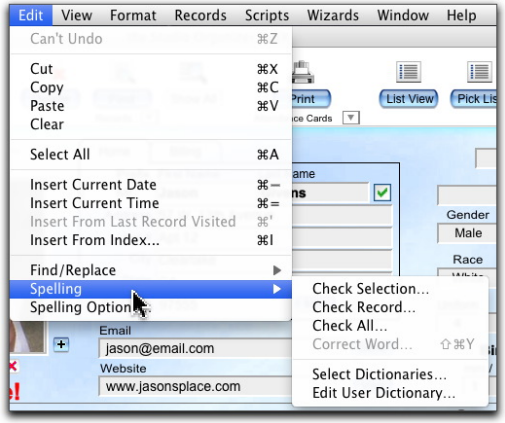
Spell Checking


File Options for "_5v01"
Spelling
Indicate questionable words with special underline
To display suggested spellings, right-click or Control-click the underlined word. (Visual spell-checking can be disabled on each field object via the Field Behavior dialog.)
Check spelling as you type
Off
Beep on questionable spellings
Cancel
OK

the Spell Checking Preference
Go to the General folder tab of the Preferences screen then click the Select Spelling Option link at the bottom of the screen. Next, click on the Spelling folder tab to select your Spell Checking options.

If a word is misspelled the computer will either beep, or underline the word in red.

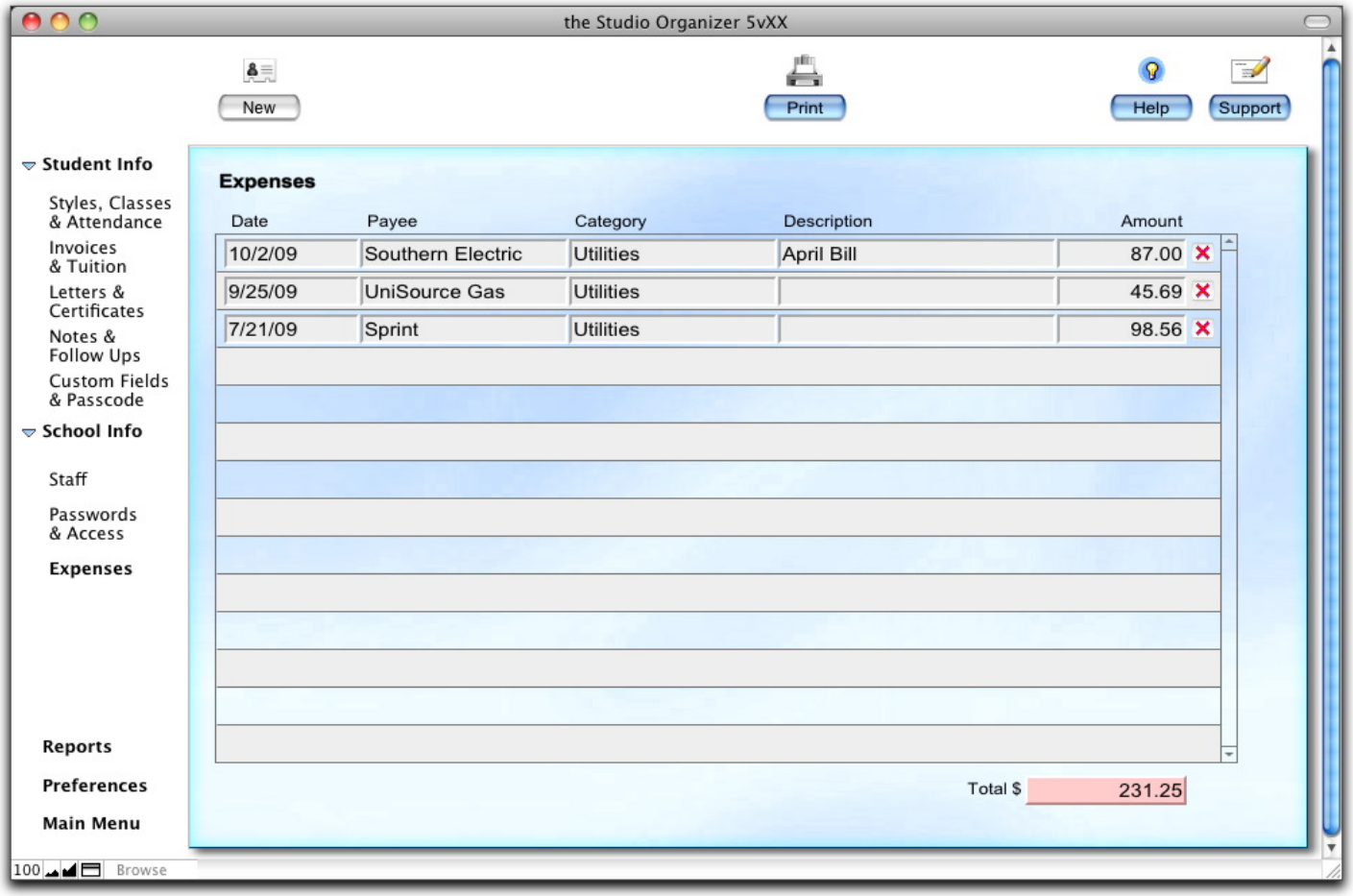
If a word is misspelled, you can right click (PC) or Control click (Mac) on the word to display a list of suggested spellings then select the correct word.



the User Dictionary
To select the User Dictionary, go to the Edit menu and select Spelling, then select Dictionary. The user dictionary is in the *Extensions* folder inside the *Studio Organizer* folder.

To edit your dictionary, go to the Edit menu and select Spelling, then Edit Dictionary.

Expenses



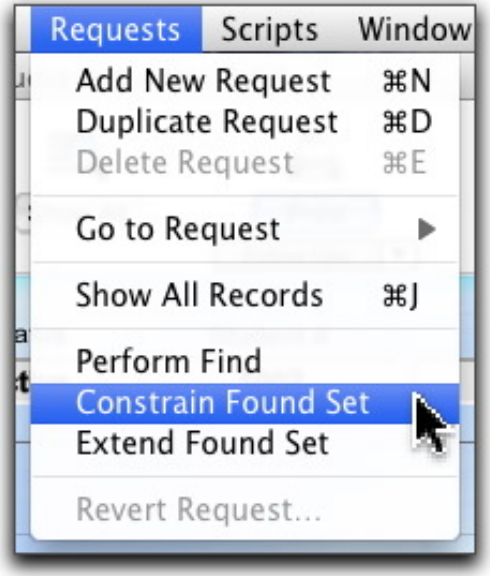
the Expenses screen

the Expenses Screen

Entering an Expense
To view the Expenses screen, click on Expenses in the column on the left.

To enter an expense, click the New button in the top left corner of the screen.

Enter the details of the expense, then click Save & Add Another to create a new expense record, or click Save.



To print an Expense Report click the Print button, or go to the Reports screen and select Finances from the drop down list of categories, then click on Expenses.

Printing Expenses
To print an expense report click the Print button at the top of the Expenses screen or go to the Reports screen and select Finances from the drop down list of categories, click on Expenses, then click the Create It button.

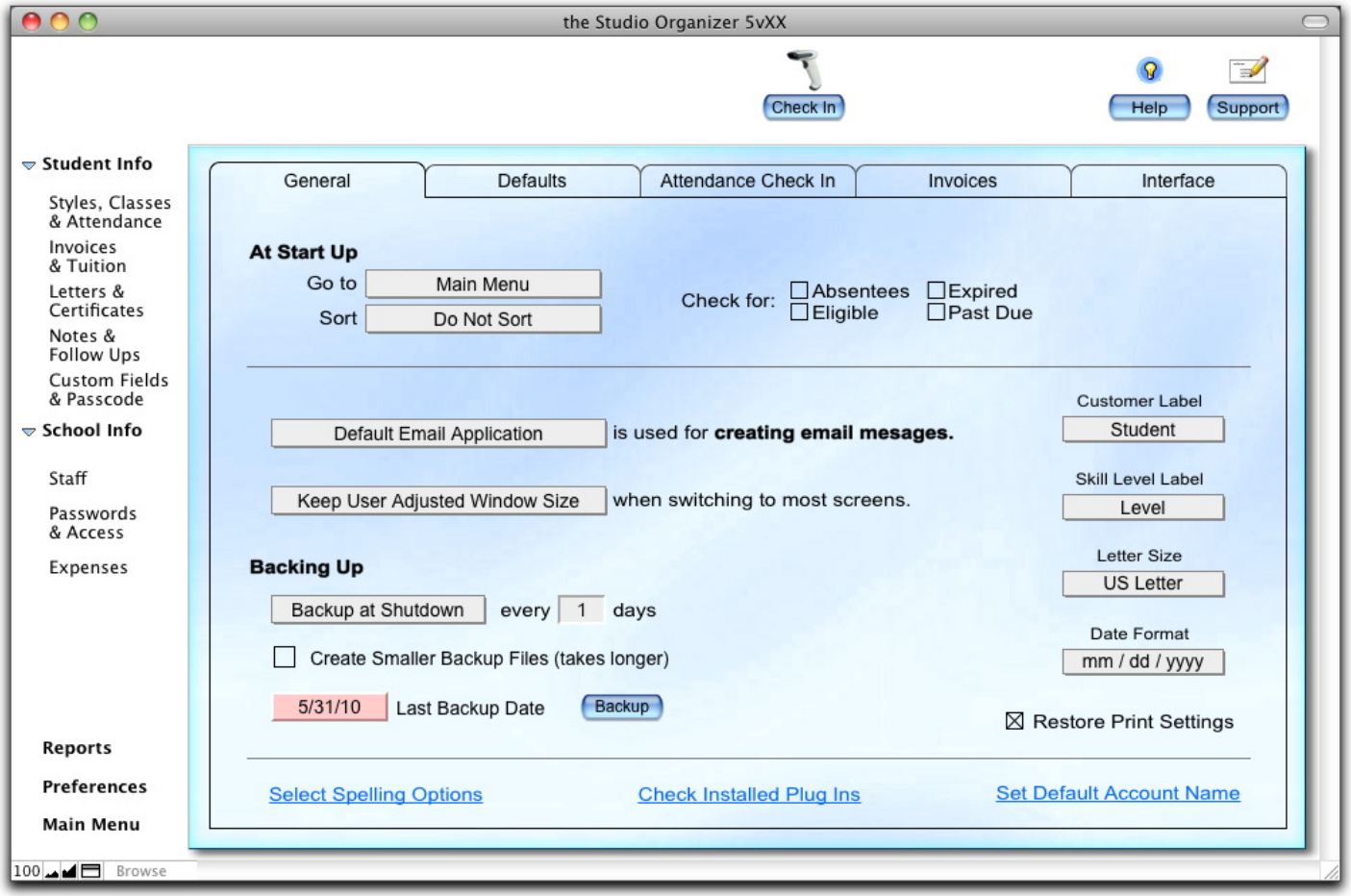
A find screen will appear. Select a category, payee or range of dates. All fields are optional. If field is left blank, all values in that field will be included in the report.

Click the Continue button to create the report.

When viewing the report, click the Preview button to see how the report will print, including category totals. Click the Print button to print the report.

Total Expenses & Your Accounting Software
You can use the expense recording feature of the Studio Organizer by itself, or side by side with your accounting software. Enter your expenses, then create the Expense report. Since expenses are totaled by category when your report is printed, you can now take the total amounts from this report and enter them into your accounting software as a single journal entry.

Preferences

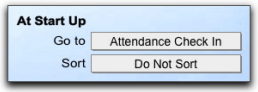


the General Preferences screen

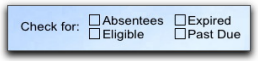
the Preferences Screen

On the Main Menu or any data entry screen click the Preferences button.

Here you can select preferences and defaults for new record creation, starting up, backing up, attendance check in, invoices, email, spelling and more.



At Start Up Preferences
On the General folder tab of the Preferences screen, you can select start up options. These include:

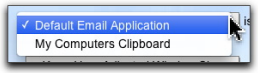


Go to the Main Menu, the Student Info screen, the transferring files screen or automatically begin attendance check in.
Sort by Last Name, Last Name & Status or Do Not Sort.
Check for Absentees, Eligible to Test, Expired or Past Due.

If any student is Absent, Eligible, Almost Eligible, Expired, Almost Expired or past due, a message will flash on your screen when you open the Studio Organizer.

Start Up messages will only appear when you *open* the Studio Organizer.

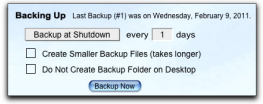
Email Sending Preference
On the General folder tab of the Preferences screen, you select whether your default email application will be used to send an email, or if the text of the email will copied into your computers clipboard.



If you're using America Online or an email service that you check by opening a web page such as gmail, Yahoo, Hotmail, you'll want to use your computers clipboard. Now each time you click the Email button or send a support question the text of the message is copied to the clipboard. Open your web browser and go to your email web page, create a new email message and paste into the message area.

If you are using Windows Live Mail, Outlook Express, Entourage, or OS X mail, you'll select Default Email Application.
See *Email Application: Setting the Default* for details.

General Preferences

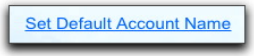


Backup Snapshot Preference
On the General folder tab of the Preferences screen select your backup snapshot options. Select *Backup at Shutdown every 1 day* and the Studio Organizer will be backed up every time you close the program. A numbered backup folder will be placed on your desktop, unless the "Do Not Create a Backup Folder on Desktop" box is checked. Copy this folder to a USB flash drive and take it home for safe keeping. See Backing Up in the built in Help for more details.

Student & Rank Labels
On the General folder tab of the Preferences screen you'll find the Customer and Skill Level Label fields. These let you select the terminology used throughout the software. Customers can be called students, customers, members or clients. The second field lets you decide if ranks will be called ranks or levels. The selections you make here will be applied throughout the software. Some hard coded information, such as report descriptions, may use the terms students and ranks, but buttons, headings, and everything you print will use these labels.

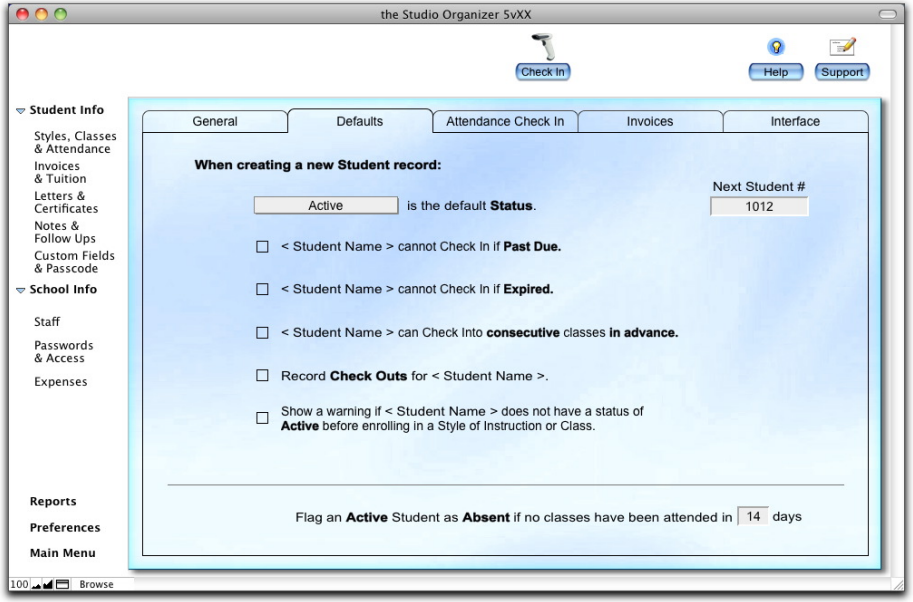
Spell Checking
Click the Select Spelling Option link, then click on the Spelling folder tab to select your Spell Checking options.

Default Account Name Preference
You can change the account name in the opening log in dialog box that is displayed every time you open the Studio Organizer. Do this by going to the General folder tab of the Preferences screen and clicking Set Default Account Name at the bottom of the screen, then changing the User Name field.



Restore Print Settings Preference
The Restore Print Settings check box on the General folder tab of the Preferences screen should be unchecked if you are receiving any type of double sided printing error. Otherwise, leave this box checked. Doing so will assure the *Records Being Browsed* and *Current Record* settings will be correct when printing.

Preferences - Defaults



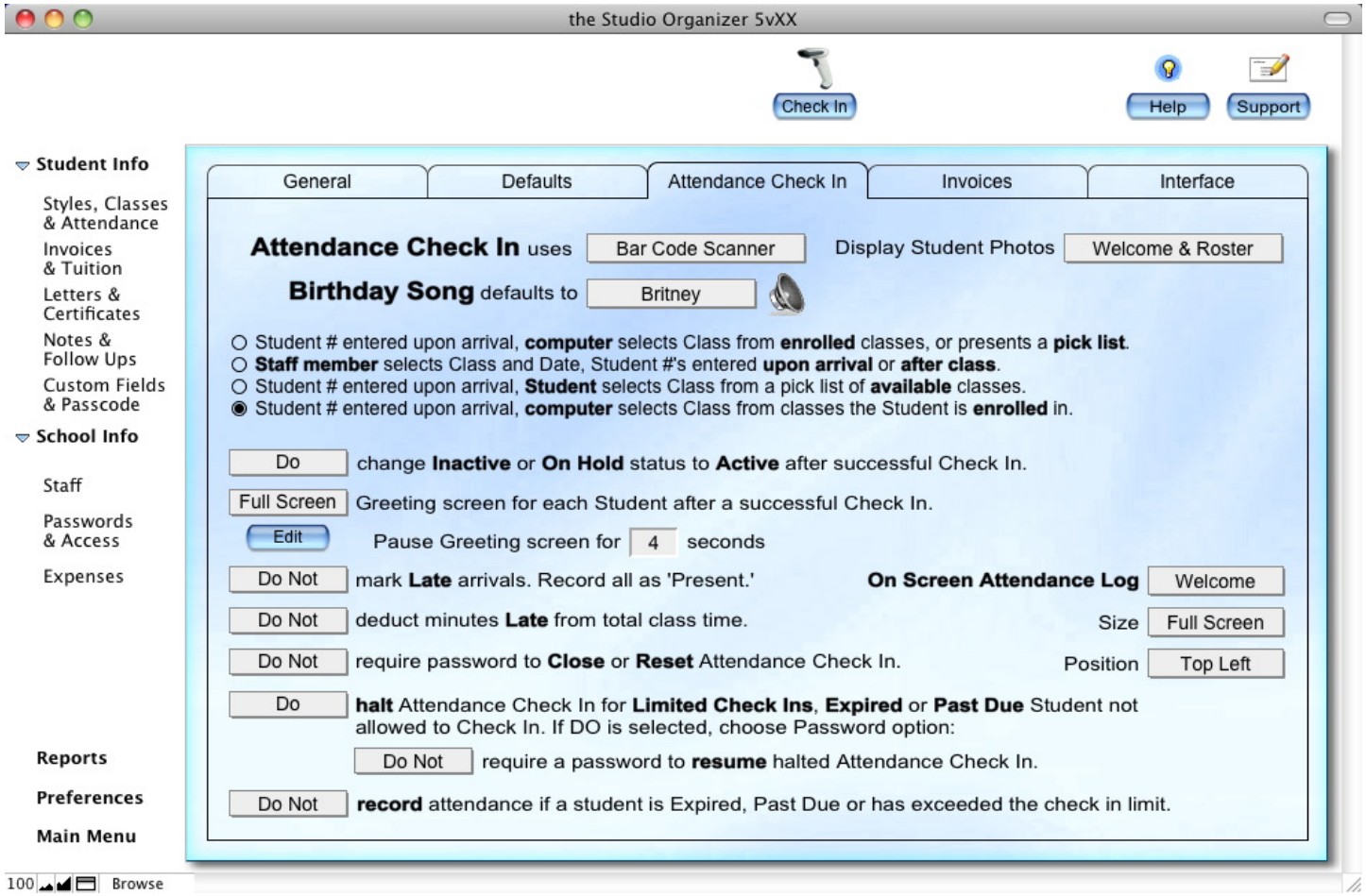
On the Preferences screen click the Defaults folder tab to see the defaults used on the Check In Options folder tab of the Styles, Classes & Attendance screen.

The check boxes on the Defaults folder tab mirror those found on the Check In Options folder tab of the Styles, Classes & Attendance screen.

The Next Student # field allows you to create your own student #'s. Enter any number you wish and that number will automatically be incremented by one. Only numbers can be used.

These defaults are not applied to existing records, only new student records created using the New or Duplicate buttons on the Student Info screen.

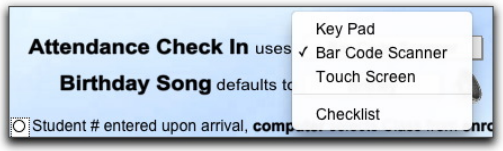
Absentee Preference
It's easy to flag absent students. Just go to the Defaults folder tab of the Preferences screen and enter a number in the *Flag An Active Student As Absent If Student Has Not Attended A Class For X Days* field. If you enter `14`, any active student who has not attended a class in 14 days will have the word *Absent* appear under their photo on the Student Info screen.


the Studio Organizer 5vXX
Check In
Help
Support
Student Info
Styles, Classes & Attendance
Invoices & Tuition
Letters & Certificates
Notes & Follow Ups
Custom Fields & Passcode
School Info
Staff
Passwords & Access
Expenses
Reports
Preferences
Main Menu
General
Defaults
Attendance Check In
Invoices
Interface
Attendance Check In uses
Bar Code Scanner
Display Student Photos
Welcome & Roster
Birthday Song defaults to
Britney
Student # entered upon arrival, computer selects Class from enrolled classes, or presents a pick list.
Staff member selects Class and Date, Student #'s entered upon arrival or after class.
Student # entered upon arrival, Student selects Class from a pick list of available classes.
Student # entered upon arrival, computer selects Class from classes the Student is enrolled in.
Do
change Inactive or On Hold status to Active after successful Check In.
Full Screen
Greeting screen for each Student after a successful Check In.
Edit
Pause Greeting screen for 4 seconds
Do Not
mark Late arrivals. Record all as 'Present.'
On Screen Attendance Log
Welcome
Do Not
deduct minutes Late from total class time.
Size
Full Screen
Do Not
require password to Close or Reset Attendance Check In.
Position
Top Left
Do
halt Attendance Check In for Limited Check Ins, Expired or Past Due Student not allowed to Check In. If DO is selected, choose Password option:
Do Not
require a password to resume halted Attendance Check In.
Do Not
record attendance if a student is Expired, Past Due or has exceeded the check in limit.
100
Browse

the Attendance Check In Preferences screen

the Preferences Screen

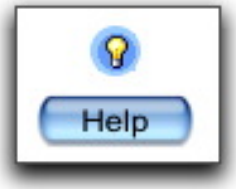
Attendance Recording Hardware Preference
When it comes to recording attendance, everything starts at the Attendance Check In folder tab of the Preferences screen.



First, select the hardware you'll use: Bar Code Scanner, Touch Screen or Keypad.
(If you're using a bar code card reader, you'll select Bar Code Scanner.)

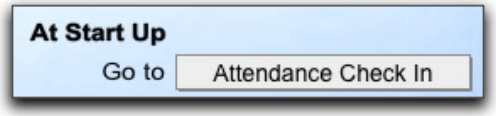
Each of the check in options will be explained in detail in the following pages.

Remember all of this information is just a mouse click away. Click the Help button any time you need to refresh your memory.



Begin Attendance Check in at start up
If you wish, the Studio Organizer can immediately begin attendance check in each time the software opens.

To do this, go to the Preferences screen and click on the General folder tab. Select Attendance Check In from the Go To drop down menu in the At Start Up section.



No Class Found Error Message
When recording attendance, be sure each student is enrolled in a style of instruction. Otherwise a *No Class Found* error message will appear even if the student is checking into a class they are not enrolled in.

Attendance Check In Option 1

On the Attendance Check In folder tab of the Preferences screen you can select how attendance will be recorded.

Option 1
In order for an attendance greeting screen to be displayed the student must be enrolled in the style of instruction of the class being attending. When check in option 1 is selected the student must also be *enrolled* in the class being attended.

Use Option 1 if students normally check themselves in and you've enrolled each student in the style of instruction and classes they can attend. This is done on the Styles, Classes & Attendance screen.

When a student scans their ID card or enters their passcode the computer selects the class to record based on enrolled classes or presents a pick list of all available classes if more than one class is available. The computer records the check in time and date.

How it Works
When a student arrives for class he enters his Student # and the computer searches for a matching class from the list of classes this student is enrolled in.

The student must check into the class within a half hour of the class start time.
For example: If a class starts at 7 p.m., students can check in as early as 6:30 p.m. (6:29 p.m. or before is too early.)
Students arriving late can check in as late as 7:30 p.m. (7:31 p.m. or after is too late.)

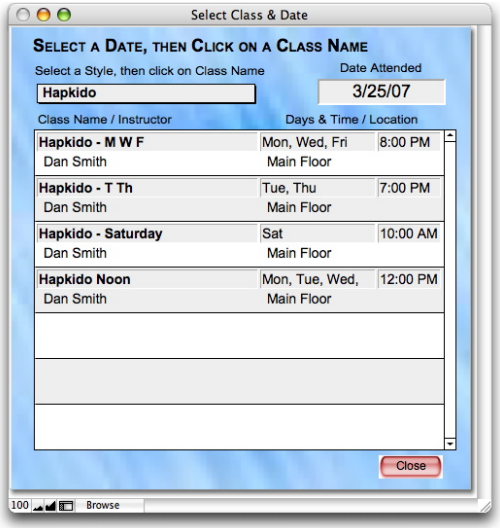
If one class is found, that class is automatically selected and current time and date are recorded.
If more than one enrolled class is found, the student will be prompted to pick a class from a list.

If no enrolled classes are found, a list of all available classes is displayed and the student will be prompted to pick a class from the pick list. The student may not be enrolled in classes presented in the pick list.
When viewing a pick list, classes are numbered and the student must select a number.
If using a keyboard, the student must type the number and hit the NUMBER PAD ENTER key.
If using a touch screen, the student simply touches in the number.
If using a mouse the student simply clicks on the number of the class.
If using a bar code scanner, a printout of bar coded numbers 1 thru 9 (the Bar Codes sheet) should be placed beside the computer so students can scan the correct number to select a class.

Attendance Check In Option 2

On the Attendance Check In folder tab on the Preferences screen you can select how attendance will be recorded.

Option 2
In order for a attendance greeting screen to be displayed, the student must be enrolled in the style of instruction of the class being attending. With this option, the student does not have to be enrolled in the class being attended.



Use Option 2 if students normally check themselves in, but a staff member preselects the class and date being attended

OR

If you would like to record attendance after a class has been completed.

A staff member selects the class and date.
The computer records the check in time.

How it Works
When attendance check in is started, a screen appears prompting the staff member to select a date and class.

The staff member can modify the date of the class and use the drop down menu to display different classes in different styles of instruction.

To select a class, single click directly on a class name.

All students that check in will be recorded as attending this class. The computer will record the check in time.

Attendance Check In Option 3

On the Attendance Check In folder tab on the Preferences screen, you can select how attendance will be recorded.

Option 3
In order for a attendance greeting screen to be displayed, the student must be enrolled in the style of instruction of the class being attending. With this option, the student does not have to be enrolled in the class being attended.

Use Option 3 if students normally check themselves in and you would like them to be able to pick from a list of all available classes. Class enrollment is not required.

The student selects a class from pick list.
The computer records the check in time and date.

How it Works
When a student arrives for class, they enter their Student # and the computer displays a list of available classes.

The student must check into the class within a half hour of the class start time.
For example: If a class starts at 7 p.m., students can check in as early as 6:30 p.m. (6:29 p.m. or before is too early.)
Students arriving late can check in as late as 7:30 p.m. (7:31 p.m. or after is too late.)

If no classes are available the time and date of attendance will be recorded, with *No Class Found* as the class name.

When viewing a pick list, classes are numbered and the student must select a number.
If using a keyboard, the student must type the number and hit the NUMBER PAD ENTER key.
If using a touch screen, the student simply touches in the number.
If using a mouse the student simply clicks on the number of the class.
If using a bar code scanner, a printout of bar coded numbers 1 thru 9 (the Bar Codes sheet) should be placed beside the computer so students can scan the correct number to select a class.

Attendance Check In Option 4

On the Attendance Check In folder tab on the Preferences screen you can select how attendance will be recorded.

Option 4 - No User Interaction Required
In order for a attendance greeting screen to be displayed, the student must be enrolled in one or more classes, as well as the style of instruction of the class(es) being attending. With this option, the student *must* be enrolled in the class(es) being attended, otherwise *No Class Found* is recorded.

Use Option 4 if students normally check themselves in and you've enrolled each student in the style and classes they attend. This is done on the Styles, Classes & Attendance screen. The computer will select the class to record, but this can be edited later if necessary.

The computer selects a class from the students enrolled classes and records the check in time and date.

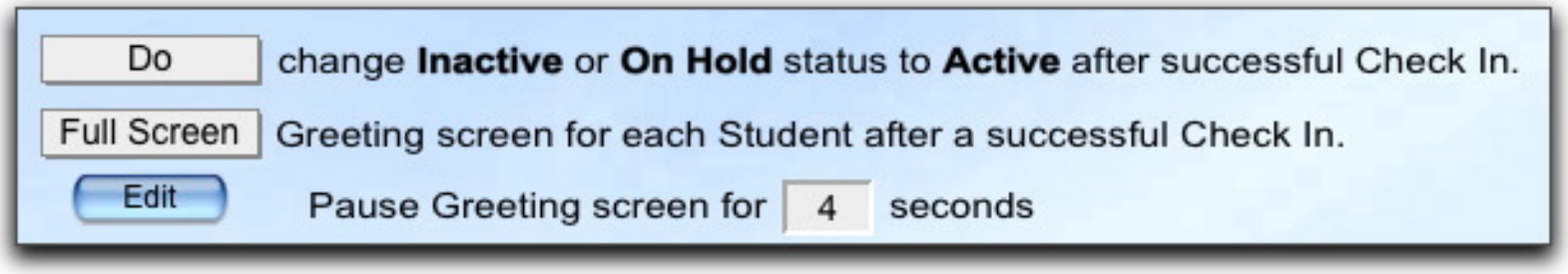
How it Works
When a student arrives for class, they enter their Student # and the computer searches for a matching class from the list of classes this student is *enrolled* in, based on the day of the week. No user interaction is required with this option. The computer will always make a selection (which can be edited later) based on these criteria:

If **no** enrolled classes are found for this day of the week, the time and date are recorded, with *No Class Found* as the class name. Example: Janie Steven's checks in on Tuesday at 5 p.m. She is not enrolled in any classes that meet on Tuesday. *No Class Found* will be recorded with the current time and date.

If **one** enrolled class is found for this day of the week, that class is automatically selected regardless of the class start time and the current time and date are recorded. Example: Bill Smith checks on Thursday at 5 p.m. He is enrolled in one class that meets on Thursday at 6:45 p.m. Regardless of the current time, Bill will be checked into the 6:45 p.m. class with the current time and date. Even if he checks in at 7:00 p.m. he will be checked into the 6:45 p.m. class.

If **more than one** enrolled classes are found for this day of the week, the computer will select the class with a start time closest to the time of check in. The current time and date are recorded. Example: Fred Miller checks in on Tuesday at 6:50 p. m. He is enrolled in Tuesday classes that start at 6:30 and 7:00 p.m. Fred will be checked into the 7:00 p.m. class.
Example: Jess Martin checks in on Monday at 5:05 p.m. He is enrolled in Monday classes that start at 4:45 and 5:00 p.m. Jess will be checked into the 5:00 p.m. class.

Attendance Preferences


Do
change Inactive or On Hold status to Active after successful Check In.
Full Screen
Greeting screen for each Student after a successful Check In.
Edit
Pause Greeting screen for
4
seconds

Changing the Status to Active at Check In
The Studio Organizer can automatically update the status of an inactive or on hold student when they check themselves into a class.

Go to the Preferences screen and click on the Attendance Check In folder tab. Select *Do Change Inactive or On Hold to Active after successful Check In.*

Displaying the Attendance Greeting
To display the attendance greeting, go to the Preferences screen and click on the Attendance Check In folder tab. Make a selection from the drop down menu to the left of *Greeting screen for each student after a successful Check In.*

Full Screen will maximize the attendance greeting to fill the entire screen.

Show will display the attendance greeting in its own window.

Hide will not display the attendance greeting.

In the *Pause Greeting screen for X seconds* field enter the number of seconds you would like the message to be displayed.

Click the **Edit** button to customize your attendance greeting screen.

In order for a attendance greeting screen to be displayed, a student must be enrolled in the style of instruction of the class being attending.

the Attendance Greeting Editor

You can customize the attendance greeting. To do this go to the Attendance Check In folder tab of the Preferences screen. Click on the Edit button in the middle of the screen. This displays the attendance greeting editor.

The school logo is automatically inserted in the top left corner of the screen, and the style of instruction logo is placed in the top right corner. (The school logo is inserted on the School Info screen, and style logos on the Style Preferences screen. See the *School Setup* tutorial for details.)

You can type any text you wish into the gray text field.

To insert a merge field which will insert the student's data when the attendance greeting screen is displayed, make a selection from the Merge Field drop down menu.

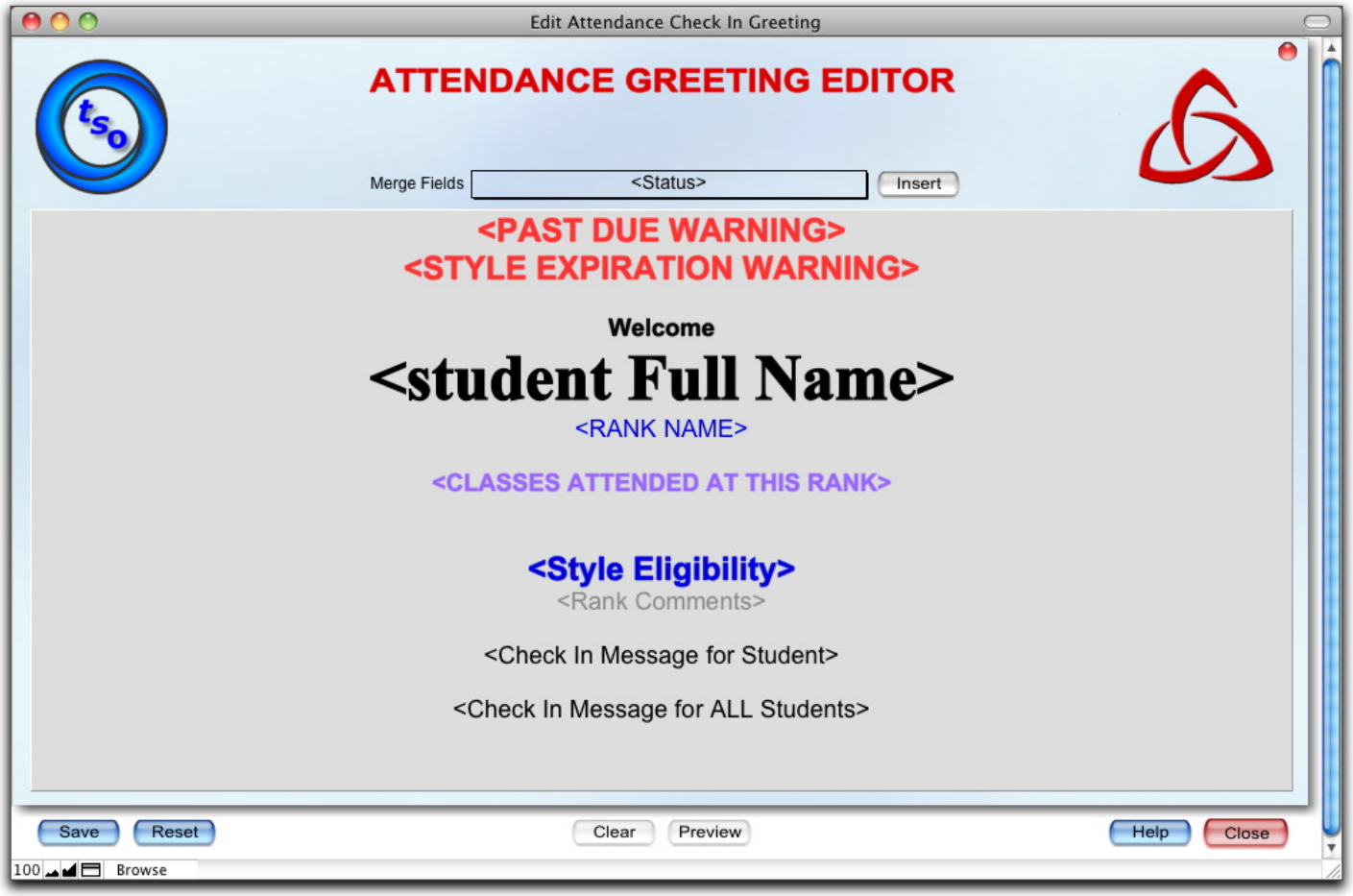
Next, click the cursor into the gray box at the location you wish the merge field to be inserted then click the Insert button. The merge field will be inserted at the location of the cursor.

For a complete list of available merge fields click the Help button and read *Merge Fields for the Attendance Greeting*.

Birthday Greetings

There is no birthday greeting merge field since "Happy Birthday" is automatically displayed under the School Name if it's the day of, the day before, or the day after a student's birthday.

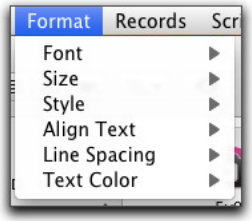
You can disable the birthday message for an individual student by going to the Styles, Classes & Attendance screen for that student and selecting *Ignore Birthday* from the drop down menu on the Check In Options folder tab.



the Attendance Greeting Editor displaying merge fields

Changing the Font, Size & Color
You can change the font, size, style, alignment and color of the text displayed in the attendance greeting.

First, highlight the text you wish to change.



Next, go to the Format menu in the menu bar at the top of the screen and select a font, size, style, etc.

To make changes even faster, select Formatting Bar from the view menu. This will display the most commonly used text formatting options at the top of the windows.

Remember, changes are only applied to text that has been selected.

Save & Reset Buttons
It is not required to click the Save button, but if you have the screen designed the way you like, click the Save button in the lower left corner of the attendance greeting editor.

Now you can experiment with additional changes.

If you do not like the changes you've made, click the Reset button to restore your last saved text.

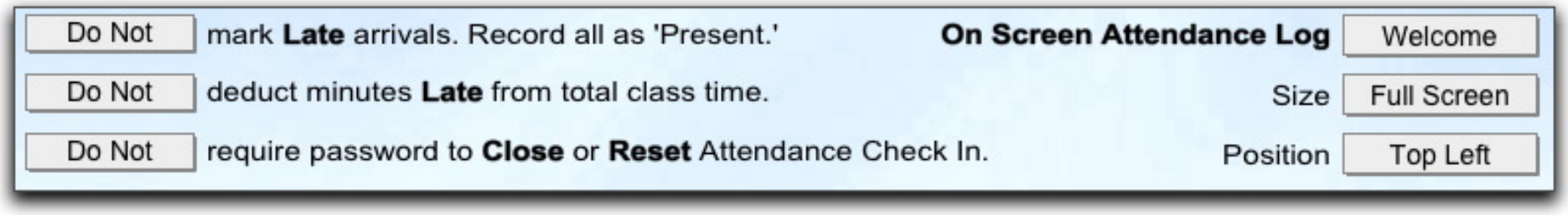
Previewing the Attendance Greeting
Click the Preview button to see how your attendance greeting will appear.

Use the card file at the top left of the screen to browse though your student records.

Click the right card to view the next record.
Click the left card to view the previous record.

Click the Continue button to close the preview window.

Late Arrivals & the On-screen Log



Attendance Check In: Late Arrivals
To record late arrivals select *Do* as the *Mark Late Arrivals* preference on the Attendance Check In folder tab of the Preferences screen.

If you select *Do Not* all students will be recorded as present when they check themselves in.

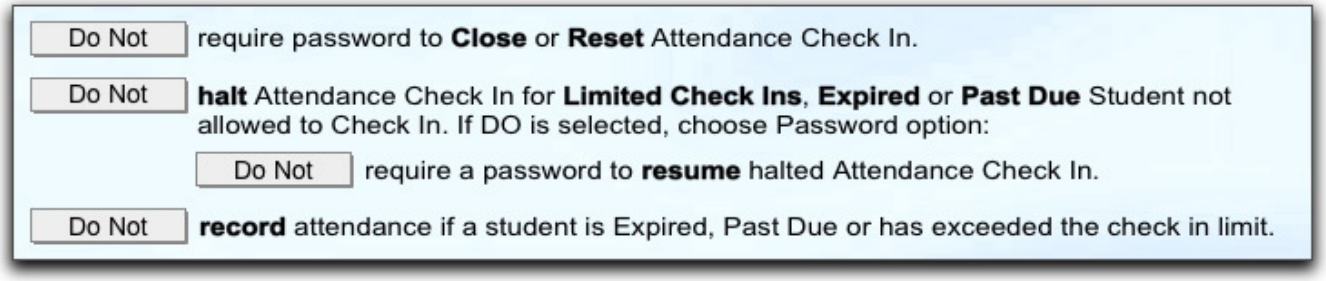
To deduct late minutes from the class time select *Do* as the *Deduct Minutes Late From Total Class Time* preference. For example if a student checks in 4 minutes late for a one hour class the time field will display 0:56.

Select *Do Not* if you wish the total time of the class to be recorded even if a student is late. For example if a student checks in 8 minutes late for a one hour class the time field will display 1:00.

Preferences for the Attendance Greeting Log
There are three drop down menus on the right side of the Attendance Check In folder tab on the Preferences screen that let you select how check in log will display during attendance recording.

On Screen Attendance Log
Select Welcome, Detailed, Brief or None. Welcome displays an attractive window displaying your school name and logo. Detailed and Brief display text logs only.
Size
Select Full Screen or Small Screen.
Position
Select Top Left, Bottom Left, Top Right or Bottom Right. This setting is only applied if small screen size is selected.
The background colors of fields on the attendance check in log are inverted if the date of attendance is not the current date. This provides a visual clue for spotting check ins not created on the current date.

Halting Check In


Do Not
require password to Close or Reset Attendance Check In.
Do Not
halt Attendance Check In for Limited Check Ins, Expired or Past Due Student not allowed to Check In. If DO is selected, choose Password option:
Do Not
require a password to resume halted Attendance Check In.
Do Not
record attendance if a student is Expired, Past Due or has exceeded the check in limit.

There are four attendance check in preferences that allow you to control attendance recording and prevent tampering.

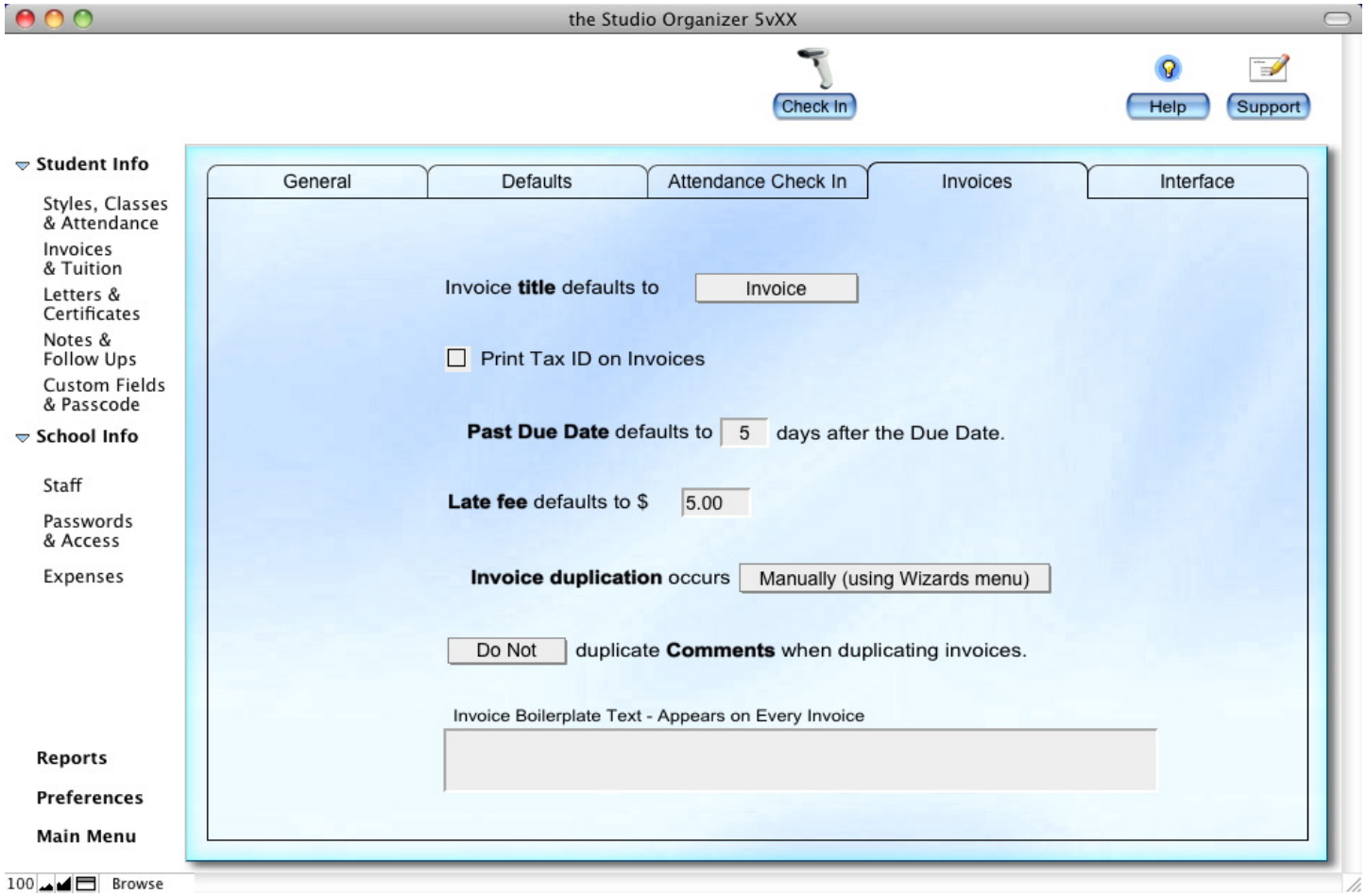
Do / Do Not Require Password To Close Or Reset Attendance Check In. Set to *Do* and a staff password will be required to reset or close attendance check in. Any account password can be used.

Do / Do Not Halt Attendance Check In For Limited Check Ins, Expired Or Past Due Students Not Allowed To Check In. Set to *Do* and a dialog box will appear when a past due or expired student who is not allowed to check in enters their student # or passcode. The dialog box will remain on the screen until it is dismissed.

Do / Do Not Require Password To Resume Halted Attendance Check In. Set to *Do* and a password will be required when a past due or expired student who is not allowed to check in enters their student # or passcode. Any account password can be used. This option is only used if *Do* is selected in the previous preference.

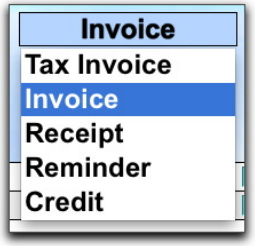
Do / Do Not Record Attendance For Halted Attendance Check In. Select *Do Not* and an *Access Denied* message will appear when a past due or expired student who is not allowed to check in enters their student # or passcode. Attendance will not be recorded.

Preferences - Invoices



Invoice Preferences

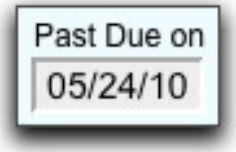
Preferences - Invoices



The invoice preferences are on the Invoices folder tab of the Preferences screen.

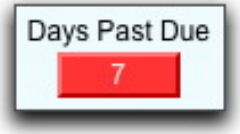
Invoice Title Defaults To
This drop down menu lets you select the title of an invoice when it is created. This title can be edited on the invoice at any time by clicking on the title on the Invoice Entry screen.

Print TAX ID or ABN on Invoices
Check this box if you want your Tax ID or ABN number to print on each invoice.



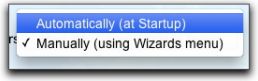
Past Due Defaults to X Days after Due Date
Enter a number and the Past Due On field on the Payments folder tab of the Invoice Entry screen will automatically be calculated when an invoice is created. Enter 0 if you want the invoice Date Due and the Past Due On dates to be the same.

Both the Date Due and the Past Due On dates can be edited at any time on the Invoice Entry screen.



Late Fee Defaults To
If you charge late fees, enter the standard late fee here. Otherwise, leave this field blank. Late fees are never automatically added to an invoice. The can be added quickly by clicking the Late Fee + button on the Invoice Entry or Record Invoice Payments Wizard screen. The late fee amount can be modified on each invoice.

Invoice Duplication Occurs
This is an important setting to understand. If you select *Manually (using Wizards menu)* invoice duplication will only occur when you select *Auto Dup Invoices* from the Wizards menu at the top of the computer screen.

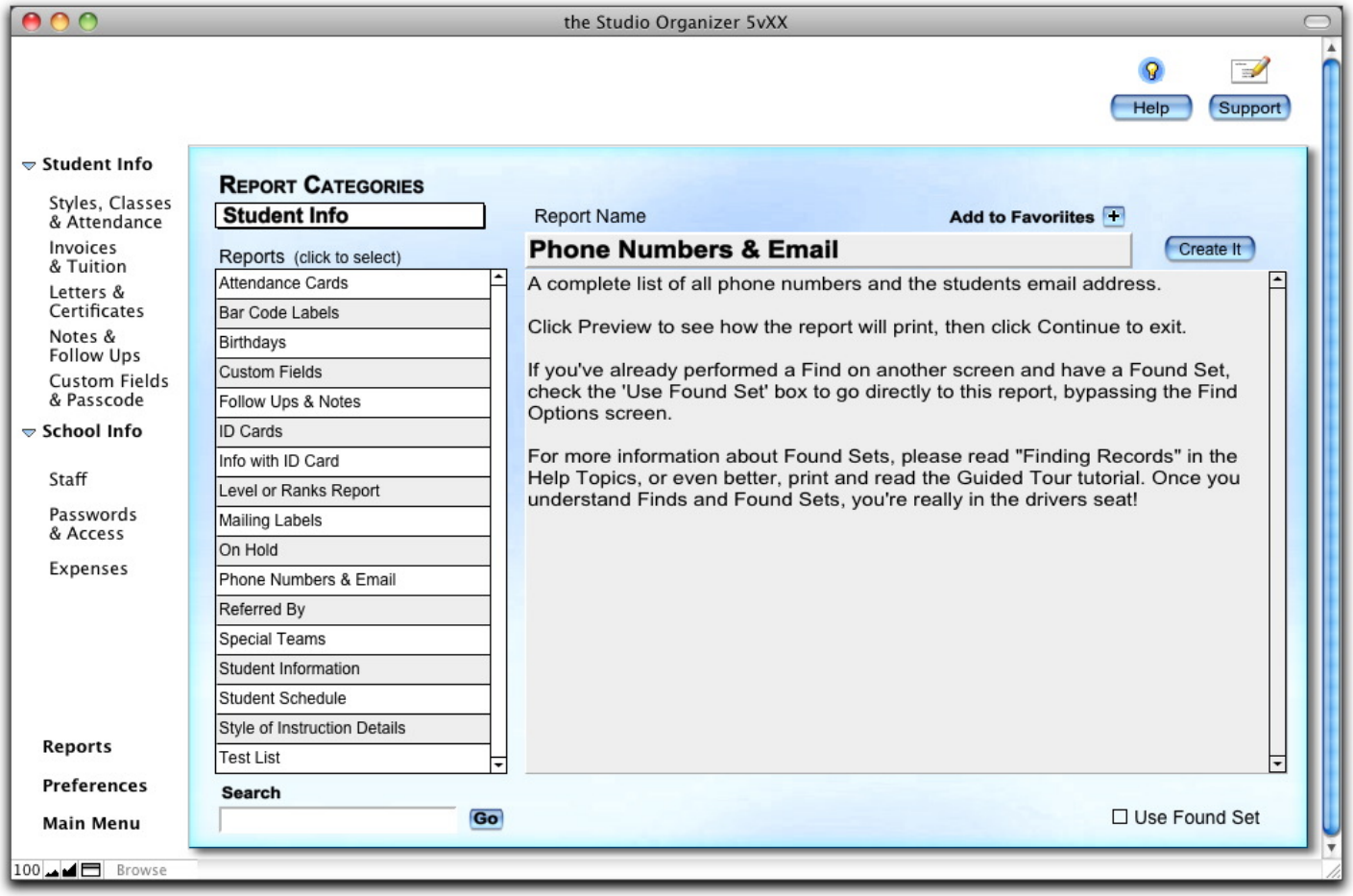


If *Automatically (at Start up)* is selected each time the Studio Organizer is opened a dialog box will appear asking if you would like to duplicate invoices. Click Cancel if you do not wish to duplicate invoices at this time.

Do / Do Not Duplicate Comments
When duplicating invoices, the comments fields on each invoice can be left blank, or duplicated. The default setting is *Do Not* since invoice comments normally contain payment information.

Reports

Reports

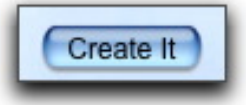

the Studio Organizer 5vXX
Help
Support
Student Info
Styles, Classes & Attendance
Invoices & Tuition
Letters & Certificates
Notes & Follow Ups
Custom Fields & Passcode
School Info
Staff
Passwords & Access
Expenses
Reports
Preferences
Main Menu
REPORT CATEGORIES
Student Info
Reports (click to select)
Attendance Cards
Bar Code Labels
Birthdays
Custom Fields
Follow Ups & Notes
ID Cards
Info with ID Card
Level or Ranks Report
Mailing Labels
On Hold
Phone Numbers & Email
Referred By
Special Teams
Student Information
Student Schedule
Style of Instruction Details
Test List
Search
Go
Report Name
Add to Favoriites
Phone Numbers & Email
Create It
A complete list of all phone numbers and the students email address.
Click Preview to see how the report will print, then click Continue to exit.
If you've already performed a Find on another screen and have a Found Set, check the 'Use Found Set' box to go directly to this report, bypassing the Find Options screen.
For more information about Found Sets, please read "Finding Records" in the Help Topics, or even better, print and read the Guided Tour tutorial. Once you understand Finds and Found Sets, you're really in the drivers seat!
Use Found Set
100
Browse

the Reports Menu

Reports

Creating a Report
There are many reports available in a variety of categories. To create a report, click the Reports button on the Main Menu. Next, select a category from the drop down list.

Click on any of the report titles listed in the column on the left. Read the description of the report in the box on the right, then click the Create It button.



Many reports will present a find screen. In these find screens you can select a range of dates, the style of instruction, student name, class name or more. Enter find criteria into a field to narrow your search. Any search field left blank will not be used in your search. All values of that field will be displayed. Read the instructions on the right of the find screen for details.

Click the Continue button to create the report. If available, click the Detailed, Brief or other buttons at the bottom of the screen to switch between variations of the same report.

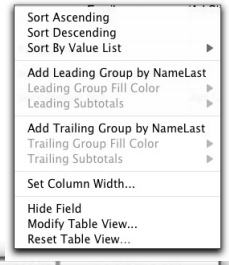
Finally, click the Preview button to see how the report will print. There are often differences between the on-screen display of the report and how that report will print. Click Preview to see the report as it will print.

Add to Favorites
If there is a report you run frequently you can add it to your favorites list. Just select the report from the column on the left then click the Add to Favorites + button. This adds the report to the Favorites category.

Use Found Set Check box
The Use Found Set check box on the Reports screen allows you to create reports after you've performed a find on one of the Student Info screens. Some reports cannot use the found set. This is noted in the report description.

Preview Button
Many reports and screens have a Preview button. Click this button to see how the report or screen will print. This is important because some reports will print slightly differently than what you are seeing on the screen. This is especially true if a report has a variety of sorting options, or subtotals by category, class, date, etc.
Try different sorting options then click the Preview button to see how report will print.

Customizing a Spreadsheet Style Report



NamePrefix	NameFirst	NameLast	Email	AdrStreet1	AdrStreet2	AdrCity
Ms.	**Janie**	**Stevens**		2342 West Lake Dr.		Clearlake
Mr.	**Fred**	**Miller**	fred@gmail.com	123 Western Way		Clearlake
Ms.	**Suzie**	**Miller**	squzeeque@myspace.com	123 Western Way		Clearlake
Mr.	**Jason**	**Givens**	jason@email.com	57 W. 13th Avenue	Apt 12	Clearlake

Once you've selected a report you like, you can view it in a spreadsheet format and modify it somewhat.

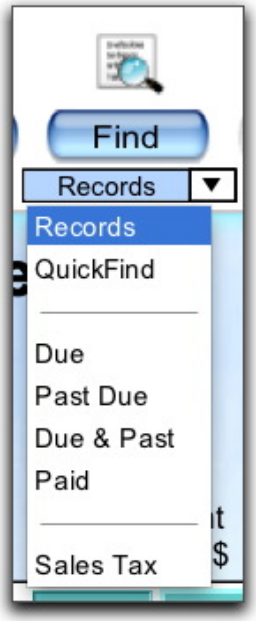
To do this, go to the View menu at the top of the computer screen and make note of the current View selection. It will either be *View as List* or *View as Form*. You'll need to know which setting you started with, so make a note of the current selection.

Next, from the View menu select *View as Table*. This displays the report or screen you are currently viewing in a spreadsheet format. This can be customized to some extent. For example, you can click and drag a column heading to rearrange the columns. You can also resize a column by moving the cursor to the right of a column and clicking and dragging when the double arrow cursor appears.

There are other options that can be selected by moving the cursor to the column headings at the top of the screen. When the cursor is on a column heading, a small down arrow appears to the right of the column name. Click the down arrow to access this menu. Here you can sort your records, hide fields and more. Feel free to experiment with this feature and make any changes you wish.

Unfortunately additional fields cannot be added. The report is limited to the fields that appear on the original report or screen. To return to normal viewing, go to the View menu and select View as List or View as Form.

Sales Tax & Time Card Reporting



Sales Tax Reporting
There are a two options for collecting sales tax information.

From the Invoice Entry screen, select Sales Tax from the drop down menu below the Find button. Click the Find button to create the Sales Tax report.

Or go to the Reports menu and select Finances from the list of categories. To view the total sales tax for all items on an invoice, use the Sales Tax report.
To view sales tax for individual items sold, use the Invoice Items report.

Paying Staff: the Time Card Report
You can total employee hours and mark hours as paid using the Time Card report. Before you can create this report have your staff members clock in and out to record their hours. (Read *Staff Clocking In And Out* for details.)

To create this report go to the Staff screen and set the drop down menu below the Print button to Time Card Report then click the Print button. A find screen will appear, all fields are optional. Leave a field blank if you do not wish to search for a particular person, date, or status.

To find only one staff member, click the down arrow to the right of the Staff Name field and select a staffers name from the drop down list. Leave the field blank to search all staff member records. Leave the Paid? field blank to find all time card entries that have not been paid. Enter a starting date and/or ending date to create the report for a day, week, month, or any time period you wish. Leave the Starting Date field blank if you do not wish to specify a starting date. Leave the Ending Date field blank if you do not wish to specify an ending date.

Click the Continue button to create the Time Card report. Click the Print button to print the report. Click Cancel in the Print dialog box if you do not wish to print the report. Next, a dialog box will appear asking if you would like to record these time card entries as paid. Click Yes to mark all entries as paid. An entry which has been paid will display a P on the list of time card entries displayed on the Staff screen.

Technical Support

Technical Support

Email Technical Support is FREE!
The Studio Organizer is designed to be easy to use, but it's still computer software and understanding how to make it work for you means asking questions and getting answers. That's why email technical support is offered free of charge.

In order to receive free email technical support just click the Support button on the screen where your question occurs. Or select Technical Support from the Wizards or Help menu.

This will start the Smart Support Wizard. It's a powerful tool that will help you gather all of the essential information:
1) what you are attempting to do 2) the steps you are performing 3) the exact text of the error message.

Your Data is Not Included
Using the Smart Support Wizard is essential, however this does not *show* technical support the data on your computer screen. To do this you can take a snapshot of the screen and include it when you use the Smart Support Wizard. It's also possible to send snapshots by following the *Sending A Screen Snapshot* instructions in the built in Help. In some cases, technical support may request your data files. This is often the only way to resolve certain problems.

Emailing Your Question
The Smart Support Wizard will work with any email service. Be sure to select your default email application as described in the built in Help, the *School Setup* tutorial and the *User's Manual*. Your email application must be open and running before sending a message.

You can even use the Smart Support Wizard if you do not have an internet connection at your school. Read *No Internet Connection At School* in the built in Help.

Only the Studio Organizer is Supported
Please note technical support is only provided for the Studio Organizer software. Operating systems, hardware, and other software programs are outside of our area of expertise.

Telephone Support
In order to keep the Studio Organizer affordable, we do not have a call center.
Sorry, telephone support is not offered in any fashion.

Asking the Right Question

In order to help you receive the quality tech support as quickly as possible here, are a few pointers that will help you get answers fast.

Always use the Smart Support Wizard
In order to receive fast, free email technical support please always click the Support button on the screen where your question occurs. None of your data is included in the message created by clicking the Smart Support Wizard.

Please Be Specific
When you use the Smart Support Wizard it will help you gather the necessary information:

1) what you are attempting to do
2) the specific steps you are performing
3) the undesired result or text of the error message

Please provide detailed information. The more specific, the better. The idea is to provide enough information so tech support can *duplicate* your steps and see the same problem you are experiencing. Since none of your data is included when you send an email, tech support cannot see any of your records or student information useless you send a screen snapshot or email your data files.

If you're receiving an error message, please state the *exact* text of the message or include a screen snapshot.

Before you click the Send button reread your email and pretend you're someone who cannot see your computer screen or your data. Ask yourself: "Have I given this person a clear picture of the problem I'm experiencing?" "What questions will this person ask based on what I've just told him?"
"Are there any other details I should mention just to be thorough?"

If you have questions on several different screens, please click the Support button on each screen and send an individual email for each question. Sending multiple Support emails is not a problem at all. There are some issues that can only be solved if you click the Support button, so please use the Smart Support Wizard each time you ask a question.

Screen Snapshots & Emailing your Files

Sending a Screen Snapshot
The Smart Support Wizard allows you to easily add a screen snapshot to your message. However, networked computers cannot use this feature because the required file is inaccessible on the server. If you would like to send a screen snapshot manually, first complete the Smart Support Wizard and send your question. Next follow these steps to create a snapshot and email it it to tech@StudioOrganizer.com.

Macintosh
The keyboard shortcut **Command + Shift + 3** creates files on your Desktop or hard drive called 'Picture 1,' 'Picture 2' etc. You can attach this file to an email message. Some email programs allow you paste an image directly into the message area. Send your image to tech@StudioOrganizer.com.

Windows
Hit the PRINT SCREEN key on your keyboard. This places an image of the current screen on your computers clipboard. Most email software programs allow you to paste directly into an email message. Paste your screen snapshot into the message area of an email. Send your image to tech@StudioOrganizer.com.

If you cannot paste into an email message open Microsoft Word or a graphics program and paste. If asked for a file format, select `jpg` or `gif`. Once you've created a screen snapshot file, email your image to tech@StudioOrganizer.com.

Emailing Your Data Files
In certain situations technical support require your data files. In order to correct an error or troubleshoot a problem, your data files must be emailed to technical support.

Which Data Files do I Send?
Technical support will request the necessary files by name.

Before sending any files, please quit the Studio Organizer then compress and attach only the requested files. Also, be sure to always use the Smart Support Wizard when requesting support.

Email Application: Setting the Default

The Studio Organizer does not send or receive email messages. Instead, the software will transfer an email message to your email software, then the email software will send the message. An email account and internet connection are required. If you are using an email application such as Windows Live, Outlook Express, Entourage, Eudora or Mail, the next step is to designate a default email application.

For best results, be sure your email application is open and running before performing these steps or using the emailing features in the Studio Organizer.

Windows 7 & Vista

You can use any MAPI compliant email client, such as Windows Live Mail, Microsoft Entourage or Eudora. You'll select the default email application by going to the Start Menu, selecting Program Defaults, then single click the program you wish to use as the default email program from the list on the left and click **Set this program as default** on the right.

Now you can click **Choose defaults for this program** to customize the defaults for your email application. Click OK to save your changes. Restart your computer.

Windows XP

You can use any MAPI compliant email client, such as Outlook Express, Microsoft Exchange or Eudora. It may be necessary to open your email client before sending an email.

You'll select the default email application by going to the Start Menu, selecting Set Program Access and Defaults, then if it's not already selected, single click the Set Program Access and Defaults button on the bottom left.

Now you can click the **Custom** option and choose the email application you like to use and designate it as your default. Click OK to save your changes. Restart your computer.

Macintosh OS X

Macs with OS X have an application called Mail already installed. You can also use Entourage, Thunderbird or Eudora.

To change the default email application open Mail, then go to the Mail menu and select Preferences. Click the General folder tab and choose your email application from the Default Email Reader drop down menu. If your email application is not in this list, click the Select menu option and an open dialog box will appear. Now find the email application and select it.

Web Based Email & No Internet Connection

Using the Clipboard to Send Emails
If you're using America Online or a web based email service such as gmail, Yahoo, Hotmail you can use the Studio Organizer to send email and technical support messages.

Select *My Computers Clipboard is used for creating email messages* on the General folder tab of the Preferences screen, or in the Smart Support Support Wizard.

Now each time you click the Send button the email message or tech support information is copied to your computers clipboard. Open your web browser and go to your email web page, create a new email message, click into the message area and paste. Address the message to tech@StudioOrganizer.com.

Only one email message can be sent at a time. Sending multiple emails requires a dedicated email application such as Outlook, Entourage, or OS X Mail.

No Internet Connection at School
Even if you don't have an internet connection at school, you can still use the Smart Support Wizard. Here's what you'll do:

Go to the General folder tab of the Preferences screen. At the very top, select *My Computer's Clipboard is used for sending email.*

When you click Send from the Smart Support Wizard, the necessary information will be placed in your computer's clipboard. Next, open a word processor and paste. Save the file and transfer it to a USB flash drive or other media.

Insert the flash drive into the computer that has an internet connection and open the file, then select and copy all of the text.

Now open your email software, create a new email message and paste the text into the message area of the email.

Address the email to tech@StudioOrganizer.com.

Additional Help & Information Resources

the Version History
Would you like to see what's new in the Studio Organizer? Or what's been changed, added or fixed in each new release?

Just click the Version Check button on the Main Menu, then click the Version History link.

Or go to www.StudioOrganizer.com and visit the Update page, then click the Version History link.

An internet connection is required.

Your Computer Guru
If you're not 100% comfortable working with computers, please read *This is Your Brain* in the *Free eBooks* folder inside the *Studio Organizer* folder. If you're unfamiliar with the tasks technical support is asking you to perform, you will need computer professional to visit your computer.

When trouble rears it's ugly head the fastest and most efficient solution is to let a professional tackle the problem.

There's just no substitute for having a computer expert right there in the room with you, teaching you new skills, solving problems, and answering your questions. Computers are complex contraptions and finding your personal computer guru is as important as having a good mechanic or doctor. Don't go it alone, you'll be much more productive if you have an expert computer helper.

Don't want to hire a professional? Ask your students or parents. There's sure to a knowledgeable computer user who will be happy to assist you. Read *This is Your Brain* for more about finding a computer guru.